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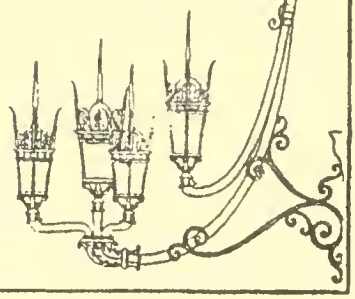

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COLUMBIA POINT PENINSULA

PROPOSAL
FOR THE DEVELOPMENT OF PHASE II

BY

HII CORPORATION

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NOVEMBER 1, 1982

COLUMBIA POINT PENINSULA

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IX. Peabody & Brown - Attorney

Housing Innovations, Inc.

One Court Street
Boston, MA 02108
Telephone (617) 720-1716

November 1, 1982

Mr. Robert J. Ryan, Director
Boston Redevelopment Authority
One City Hall Square
Boston, MA 02201

Mr. Lewis H. Spence, Receiver/Administrator
Boston Housing Authority
52 Chauncy Street
Boston, MA 02111

Mr. Roger Taylor, President
Columbia Point Community Task Force, Inc.
320 Mt. Vernon Street
Dorchester, MA 02125

Gentlemen:

Pursuant to the "Request for Developer Proposals" for the Phase II development of Columbia Point, HII Corporation is, with this Letter of Interest, forwarding its submission of qualifications. This submission includes information about each of the development team members who are:

Developer

HII Corporation
One Court Street
Boston, MA 02108

Contact Person: Richard M. Lappin, Vice President
Phone #: 617/720-1716

Management Component

Tenant Services, Inc.
One Court Street
Boston, MA 02108

Contact Person: Marcia Y. Anderson, Executive Vice President
Phone #: 617/720-1716

Niles Company, Inc.
28 State Street
Boston, MA 02106

Contact Person: Shepard Brown, Sr. Vice President
Phone #: 617/742-8630

Contractor

The Barkan Companies
1330 Boylston Street
Chestnut Hill, MA 02167

Contact Person: Robert E. Cronin, Vice President
Phone #: 617/734-9600

Architect and Community Planner

Stull Associates
100 Boylston
Boston, MA 02116

Contact Person: Donald L. Stull, President
Phone #: 617/426-0406

Landscape Architect

Moriece and Gary, Inc.
25 Mount Auburn Street
Cambridge, MA 02138

Contact Person: Gary W. Puryear, Vice President
Phone #: 617/868-2314

Engineer

Sippican Consultants International, Inc.
1033 Massachusetts Avenue
Cambridge, MA 02138

Contact Person: Albert Romaneski, President
Phone #: 617/868-1200

Legal

Peabody & Brown
One Boston Place
Boston, MA 02108

Contact Person: Edward J. Lubitz
Phone #: 617/723-8700

11/10/82

Columbia Point
Developers
Financial Analysis

	HII	CMJ	NCHP (corp)	Peabody
other current	1,747,990	1,413,813	3,860,495	21,345,965
notes rec	2,834,023	576,500	10,462,195	628,298
total current	4,582,013	1,990,313	14,322,690	21,974,263
notes rec L.T.	3,656,651	12,126,668	51,648,960	342,830
other assets	1,037,947	2,151,775	11,740,673	1,029,744
TOTAL ASSETS	$9,276,611	$16,268,756	$77,712,323	$23,346,837
cuurent liab	2,630,155	8,724,816	36,409,032	12,606,788
long term debt	1,077,189	2,438,573	19,502,547	122,085
deferred income	3,230,434	615,000	19,216,418	2,918,178
other liab	428,000	1,423,317	0	1,052,980
TOTAL LIAB	$7,365,778	$13,201,706	$75,127,997	$16,700,031
paid in capital	889,210	113,722	2,093,016	250,000
retained earnings	1,021,623	2,953,328	491,310	6,396,806
TOTAL EQUITY	$1,910,833	$3,067,050	$2,584,326	$6,646,806
revenue	1,399,516	11,012,175	59,383,494	0
expenses	1,709,236	10,542,873	59,321,472	0
net before tax	$(309,720)	$469,302	$62,022	$0
current	1.74	0.22	0.39	0.00
debt/equity	1.94	3.64	21.64	0.00
notes rec/assets	0.69	0.78	0.80	0.00

→ now much dependent on future completion

100 units 80 million

If selected, HII Corporation and the other members of the development team will prepare full development proposals and, if selected as the finalist, the development team will "proceed expeditiously" with the Columbia Point project. The development entity will be a partnership of which a subsidiary of HII Corporation will be the general Partner and the efforts of each of the members of the development team will be orchestrated through this partnership.

HII Corporation has completed over 2200 units of housing for the elderly, small families and large families and it is currently developing a luxury condominium project in the Battery Park area of New York City as well as a hotel, retail and office complex in the Times Square area of New York City. With respect to each of its projects, HII Corporation has selected development team members who have the experience and expertise necessary to ensure the expeditious completion of its developments with a minimum of problems. With respect to the current proposed development team, HII Corporation has previously worked with Stull Associates, Barkan Construction and Tenant Services, Inc., its affiliated management company.

In addition to selecting a strong team, HII Corporation, a minority-owned company of which Denis Blackett is the primary stockholder, has sought other minority companies as members of its development teams. For instance, in this case, HII Corporation has included Stull Associates, a minority-owned company, as the architect and Tenant Services, Inc., its affiliated minority-owned company, as the joint venture property manager. This type of effort is also evident in its track record. For example, in the case of Hotel Oakland Associates and Van Nuys Associates, the general contractor is a joint venture of a minority and a majority firm and the architect, in the case of the Van Nuys development, is a minority-owned firm. HII has also selected a minority contractor for the construction of its Fieldstone Associates development. In addition, with respect to its contractors, whether minority or majority, HII Corporation has worked with them to ensure that they take affirmative action to hire minority subcontractors and minority workers with respect to their work and their subcontractors work.

This effort, on the part of HII Corporation, has resulted in the development of a portfolio of residential housing with a value in excess of $92,000,000. These developments have been well-conceived, well-designed, well-constructed and are well-managed. None of these projects are in default and each

represents a significant resource of good housing which is important to the growth and stability of each of their neighborhoods and communities. Moreover, several of the developments have been placed on the National Register of Historic Places.

In order to achieve these results, HII has not only been confronted with the ordinary problems of development but has also taken on complex projects which have required innovative solutions. For instance, HII Corporation was first to take advantage of Section 11(b) Tax Exempt Mortgage Financing in the State of Massachusetts -- a method which it has used with respect to its projects in Los Angeles, California, Oakland, California and Annapolis, Maryland. In addition, HII has also developed projects which are partially-occupied and thus, require relocation. The most recent such project is East Canton Street Associates which includes the rehabilitation of four 20-unit historic buildings -- two of which are currently occupied. HII and Tenant Services have been working with the existing tenants and the tenant organization to minimize the residents' inconveniences related to the relocation process. Also, in this instance, a partnership has been organized between HII and the tenant organization for the overall development and management of this project.

Moreover, the team which HII Corporation has assembled is especially capable of successfully developing the Columbia Point project. Each of these members has significant experience in the development of complex residential projects. Stull Associates has been involved in the development of over 4000 units of housing for both low and moderate income and market-rate families. Stull Associates' office has earned a reputation for not only producing functional and quality housing, but also for designs which are noteworthy. This type of talent, given the need in the case of the Columbia project to evolve a plan that integrates existing and new structures in an overall community plan is of key importance. Barkan Construction Company has constructed over 3500 units of apartments and condominium units. These projects include both new construction and rehabilitation. This firm is noted for its excellence in the construction of housing and for taking on complicated construction tasks. In the case of the management of housing, a joint venture including Tenant Services, Inc. (HII's affiliated management company) and the Niles Company, Inc. has been established. Tenant Services, Inc. has had significant experience in the

management of low and moderate income housing and in working with tenant organizations and resolving complicated relocation needs. Niles Company is experienced both in the management of low and moderate income as well as in market-rate housing. The experience of these two firms will assure the effective management of the existing development through the construction process, the effective relocation of the existing tenants as well as the effective management of the completed development. Finally, the team also includes Moriece and Gary, Inc. as the landscape architect and Sippican Consultants International, Inc. as the engineer and the law firm of Peabody & Brown -- each of which have vast experience in dealing with all aspects of this type of development.

HII Corporation and the other members of the development team look forward to working with the Boston Redevelopment Authority, the Boston Housing Authority and the Columbia Point Community Task Force, Inc. in the development of the new mixed income community at Columbia Point. This team, it is our belief, has the capabilities to evolve a plan which will result in the highest quality housing for this community as well as a development which will be noteworthy for its overall design and community planning.

Thank you for your consideration of this proposal.

Sincerely,

HII CORPORATION

Richard Lappin

Richard M. Lappin
Vice President

PREVIOUS HOUSING DEVELOPMENT EXPERIENCE

HII Corporation has successfully developed over 2200 units of housing and approximately 50,000 square feet of commercial space with a mortgage value in excess of $92,000,000. HII's efforts were originally focused in Massachusetts -- but have more recently been expanded to Maryland and California. Each of the developments has unique features which have required innovation and perseverance to assure the successful outcome of these developments. A basic parameter for HII Corporation has been to develop housing which is well-designed and sturdily constructed and to manage, operate and maintain these developments in a "first class" manner.

Although we are currently pursuing several market-rate residential developments and, in fact, control the site in Battery Park City for the development of 138 units, HII's primary experience has been in the development of low and moderate income housing. It is our sense that our prior experience and our ongoing efforts in conventional residential development, provide a sound basis for the pursuit and successful fulfillment of the Columbia Point Development -- an effort which we have taken significant interest in over the years.

The following summaries describe each of HII's developments. None are in financial default, foreclosure or bankruptcy. Recently, Lawrenceville Associates and Intervale

Associates, which are financed by the Massachusetts Housing Finance Agency, received Section 8 Moderate Rehabilitation Subsidy through the Boston Housing Authority. This subsidy will allow sufficient income to support a mortgage increase so that necessary building improvements (especially energy-related improvements) can be accomplished and to support a realistic operating budget. Each of these developments was previously financed under the Section 236 Interest Subsidy or Section 23 Leasing Programs which did not respond to escalating operating costs. As a result of HII Corporation's efforts, these workouts, which have been closed, will result in the maintenance of good and much needed family housing as well as the payment of all outstanding back taxes to the City of Boston.

Finally, the mortgagee for the Ken Marr Associates project has alleged a mortgage default on the basis of a one day late payment of debt service. However, HII has claimed that the mortgagee granted a one day extention. Nevertheless, even if there is an assignment, the project will not be foreclosed as it is in sound financial condition and has remained current in all of its mortgage obligations.

In sum, HII Corporation, as is evidenced in the summaries, has developed a strong portfolio of housing which includes new construction and rehabilitation and housing for the elderly, small families and large families. Moreover, HII's record remains unblemished in the success of each of its developments

which not only represent high quality, well-managed housing, but also have been important to the growth and strengthening of their neighborhoods. In addition, HII has developed buildings which are historically and architecturally important and, as a result, have been included in the National Register of Historic Places.

CONCORD HOUSES ASSOCIATES

Type of Development: New Construction, two seven-story brick buildings

Location: Boston, Massachusetts

Size: 181 units

Ownership Type: Limited Partnership

Development Cost: $5,272,648

Construction Financing: Massachusetts Housing Finance Agency

Permanent Financing: Massachusetts Housing Finance Agency

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 236 Interest Subsidy, Section 23 Revised New Construction Leasing Subsidy, Rental Assistance Payment

Income Level: Low and Moderate Income

Architect: Galser/deCastro/Vitols Partnership

Landscape Architect:

Consultants:

Community/Tenant Participation: The Concord Housing Advisory Group, a neighborhood organization, sponsored this development and participated in its planning, design, development and tenant selection.

Project Status and Comments: This development which was built by Barkan Construction, has been fully occupied since 1976. It is located in the South End and was designed to complement the architectural character of this historic neighborhood. One of the two buildings is for the elderly and the other for small families. There are ten, three and four bedroom units with separate street entries.

EAST CANTON STREET ASSOCIATES

Type of Development: Rehabilitation of four 20-unit historic buildings

Location: Boston, Massachusetts

Size: 80 units

Ownership Type: Limited Partnership

Development Cost: $4,569,800

Construction Financing: BMFC, Inc.

Permanent Financing: GNMA Tandem

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 8

Income Level: Low and Moderate Income

Architect: Boston Architectural Team, Inc.

Landscape Architect:

Consultants: Madge DiNitto Associates (relocation consultant), Sam Zax Associates (elec. engr.), Environmental Design Engineers, Inc. (mech. engr.), Rene Mugnier Associates, Inc. (struc. engr.)

Community/Tenant Participation: The City of Boston acquired these buildings and, in conjunction with the Tenants' Association, selected HII Corporation as the developer. The Association has been and will be involved in the development, construction and management of the project. In addition, the tenant organization has retained a 25% equity interest in the development.

Project Status and Comments: Construction started in November 1982 and is anticipated to be completed in early 1984.

FIELDSTONE ASSOCIATES

Type of Development: Rehabilitation

Location: Boston, Massachusetts

Size: 84 units

Ownership Type: Limited Partnership

Development Cost: $4,765,000

Construction Financing: BMFC, Inc.

Permanent Financing: GNMA Tandem

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 8

Income Level: Low and Moderate

Architect: Stull Associates

Landscape Architect: Douglas B. Footit & Associates

Consultants: A & M Roofing & Sheet Metal Company, Inc.

Project Status and Comments: This development includes the rehabilitation of a school and several apartment buildings for elderly and family housing. Approximately one half of the units are completed and occupied. The balance will be completed by the end of 1982

FRANKLIN PARK ASSOCIATES, LTD.

Type of Development: Scattered-site, rehabilitation, mid-rise

Location: Boston, Massachusetts

Size: 220 units

Ownership Type: Limited Partnership

Development Cost: $7,152,653

Construction Financing: Massachusetts Housing Finance Agency

Permanent Financing: Massachusetts Housing Finance Agency

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 8, State 13A Interest Subsidy

Income Level: Low and Moderate Income

Architect: Stull Associates

Landscape Architect:

Consultants:

Project Status and Comments: This development, which was fully-occupied in 1977, includes the rehabilitation of ten buildings in the Dorchester area of Boston. About one-third of the buildings were vacant and the balance were in need of substantial rehabilitation. This project required internal relocation and has resulted not only in high quality housing, but also strengthening neighborhoods that were otherwise sound except for the blighting influence of these buildings.

GIRARD AVENUE ASSOCIATES

Type of Development: New construction, seven-story high-rise and town houses.

Location: Springfield, Massachusetts

Size: 201 units and 12,000 square feet of commercial space.

Ownership Type: Limited Partnership

Development Cost: $7,381,100

Construction Financing: Massachusetts Housing Finance Agency

Permanent Financing: Massachusetts Housing Finance Agency

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 236 Interest Subsidy, Section 8, Rental Assistance Payment

Income Level: Low and Moderate Income

Architect: Glaser/deCastro/Vitols Partnership

Landscape Architect:

Consultants:

Project Status and Comments: In 1973, the Massachusetts Housing Finance Agency closed this project with another developer but the project proved infeasible before any construction was started. The Agency requested our involvement and HII restructured and designed the project which includes housing for the elderly, small families and large families.

HOTEL OAKLAND ASSOCIATES

Type of Development: Rehabilitation, restoration and conversion of a 1912 high-rise hotel to elderly housing and commercial space.

Location: Oakland, California

Size: 315 units

Ownership Type: Limited Partnership

Development Cost: $15,617,100

Construction Financing: First Interstate Bank/Tax Exempt 11(b) Mortgage

Permanent Financing: First Interstate Bank/Tax Exempt 11(b) Mortgage

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 8

Income Level: Low and Moderate Income

Architect: The Ratcliff Architects

Landscape Architect: Robert Babcock & Associates

Consultants: Degenkolb & Associates (structural engr.), JYA Consulting Engineers (mechanical engr.), Thayer D. Hall Consulting Engrs. (electrical engr)

Project Status and Comments: This development was completed in 1980 and resulted in the conversion of a hotel, which had been vacant for 15 years, to housing and commercial space. The building, which is within three blocks of the center of downtown Oakland, has been placed on the National Register of Historic Places.

INTERVALE ASSOCIATES

Type of Development: Rehabilitation

Location: Boston, Massachusetts

Size: 6 units

Ownership Type: Limited Partnership

Development Cost: $289,100

Construction Financing: Massachusetts Housing Finance Agency

Permanent Financing: Massachusetts Housing Finance Agency

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 8 Moderate Rehabilitation Subsidy

Income Level: Low and Moderate Income

Architect: Housing Innovations, Inc.

Project Status and Comments: This project includes two wood-frame buildings which were built by HII as prototypical Infill units in 1970. The Section 8 subsidy, which was made available through the Boston Housing Authority, will allow for the upgrading of building systems and sufficient income to support a reasonable operating budget. These prototypes resulted in the development, construction and sale of 27 two-family wood-frame Infill buildings to the Boston Housing Authority. This approach has proved successful as a means of housing large families requiring five and six bedrooms.

INTERVALE-MAGNOLIA ASSOCIATES

Type of Development: Rehabilitation of three-story scattered-site brick apartment buildings

Location: Boston, Massachusetts

Size: 88

Ownership Type: Limited Partnership

Development Cost: $3,104,576

Construction Financing: Massachusetts Housing Finance Agency

Permanent Financing: Massachusetts Housing Finance Agency

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 8

Income Level: Low and Moderate Income

Architect: Boston Architectural Team, Inc.

Project Status and Comments: This project was owned by another developer and, with MHFA's approval, was sold to HII. MHFA provided Section 8 subsidy so that the project could be physically upgraded and would have an adequate operating budget.

KEN MARR ASSOCIATES

Type of Development: Rehabilitation of three-story brick garden apartment buildings

Location: Annapolis, Maryland

Size: 144 units

Ownership Type: Limited Partnership

Development Cost: $3,110,110

Construction Financing: Merrill Lynch Huntoon Paige, Inc./Tax Exempt 11(b) Mortgage

Permanent Financing: Merrill Lynch Huntoon Paige, Inc./Tax Exempt 11(b) Mortgage

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 8

Income Level: Low and Moderate Income

Architect: Boston Architectural Team, Inc.

Landscape Architect:

Consultants: Nathan S. LeBlang Associates, Inc.

Project Status and Comments: This development was purchased from the Department of Housing and Urban Development in 1979. Upgrading of the buildings and building systems was accomplished when the buildings were, in most cases, occupied. This work required planning and coordination of HII, the management agent (Tenant Services, Inc.), the contractor and the tenants.

The mortgagee has alleged that the mortgage is in default because of a payment of debt service one day late. However, it is the position of Ken Marr that the mortgagee granted a one-day extension.

(continued)

KEN MARR ASSOCIATES (continued)

As a result, the mortgagee is seeking to assign the mortgage. However, even if successful, the assignment will not result in a foreclosure as the project has remained and is current in all of its ongoing mortgage obligations.

LAWRENCEVILLE ASSOCIATES

Type of Development: Rehabilitation of three- and four-story scattered-site brick apartment buildings

Location: Boston, Massachusetts

Size: 149 units

Ownership Type: Limited Partnership

Development Cost: $3,324,293

Construction Financing: Massachusetts Housing Finance Agency

Permanent Financing: Massachusetts Housing Finance Agency

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 236 Interest Subsidy, Section 8 Moderate Rehabilitation Subsidy

Income Level: Low and Moderate Income

Architect: Housing Innovations, Inc.

Project Status and Comments: These buildings were originally rehabilitated in 1974. In 1981, the Boston Housing Authority allocated Section 8 subsidy to the project so that certain building systems (especially energy-related systems) could be upgraded and so that sufficient rental income could be generated to support a viable operating budget.

NORWELL ASSOCIATES

Type of Development: Rehabilitation of two- and three-story brick buildings

Location: Boston, Massachusetts

Size: 45 units

Ownership Type: Limited Partnership

Development Cost: $1,254,000

Construction Financing: Massachusetts Housing Finance Agency

Permanent Financing: Massachusetts Housing Finance Agency

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 8

Income Level: Low and Moderate Income

Architect: Boston Architectural Team, Inc.

Project Status and Comments: Fully-occupied in 1972

POPPLETON PLACE ASSOCIATES

Type of Development: Rehabilitation and new construction of brick row houses

Location: Baltimore, Maryland

Size: 141 units

Ownership Type: Limited Partnership

Development Cost: $5,851,900

Construction Financing: BMFC, Inc.

Permanent Financing: GNMA Tandem

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 8

Income Level: Low and Moderate Income

Architect: Stull Associates

Landscape Architect: Douglas B. Footit & Associates

Consultants: Philip E. Schafer Testing Lab, Inc., H. Malmud & Associates, Inc., ATEC Associates, Inc.

Project Status and Comments: HII Corporation was selected by the City of Baltimore to rehabilitate and provide new Infill row houses in Baltimore. Work will be completed within the next six months with some units available for occupancy within the next month.

SCHOOLHOUSE '77 ASSOCIATES.

Type of Development: Rehabilitation of two schools and a factory building and the new construction of a three-story wood frame building.
Location: Boston, Massachusetts

Size: 128 units

Ownership Type: Limited Partnership

Development Cost: $5,770,000

Construction Financing: Merrill Lynch Huntoon Paige/Tax Exempt 11(b) Mortgage

Permanent Financing: Merrill Lynch Huntoon Paige/Tax Exempt 11(b) Mortgage

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 8

Income Level: Low and Moderate Income

Architect: Boston Architectural Team, Inc.

Landscape Architect:

Consultants: Tsiang Engineering, Inc. (structural engr.), The Thompson & Litchner Company, Inc.

Community and Tenant Participation: Community organizations were formed in the school neighborhoods to participate in the planning, development and rent up of each of these buildings.

Project Status and Comments: The project, which includes housing for the elderly and small and large families, was completed in 1980 and is fully occupied. Each of the rehabilitated buildings is included in the National Register of Historic Places.

VAN NUYS ASSOCIATES

Type of Development: Rehabilitation, restoration and conversion of an historic office building to housing and commercial space.

Location: Los Angeles, California

Size: 299 units and 20,000 square feet of commercial space

Ownership Type: Limited Partnership

Development Cost: $20,216,000

Construction Financing: Security Pacific National Bank/11(b) Tax Exempt Notes

Permanent Financing: GNMA Tandem

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 8

Income Level: Low and Moderate Income

Architect: Edward C. Barker & Associates

Landscape Architect: Kobata Associates

Consultants: John A. Martin & Assoc. (structural engr), Patel & Assoc. (electrical engr.), Ciara Corporation (mechanical engr.)

Project Status and Comments: This project will result in the conversion of an office building to elderly housing and commercial space in downtown Los Angeles. Occupancy of the building, which is on the National Register of Historic Places, is anticipated in November of this year. The City of Los Angeles and the Community Redevelopment Agency insured the success of this project by issuing tax exempt notes and by providing an $800,000 subordinated loan to the project.

WOODLEDGE ASSOCIATES

Type of Development: Rehabilitation of three-story scattered-site brick apartment buildings

Location: Boston, Massachusetts

Size: 130

Ownership Type: Limited Partnership

Development Cost: $4,618,481

Construction Financing: Massachusetts Housing Finance Agency

Permanent Financing: Massachusetts Housing Finance Agency

Current Equity Interest: General Partner with a one percent partnership interest

Public Program: Section 8

Income Level: Low and Moderate Income

Architect: Boston Architectural Team, Inc.

Project Status and Comments: This project was owned by another developer and, with MHFA's approval, was sold to HII. MHFA provided Section 8 subsidy so that the project could be physically upgraded and would have an adequate operating budget

PENDING DEVELOPMENTS

HII Corporation is currently pursuing two major developments in New York City. The first is the new construction of approximately 138 condominium units and 15,000 square feet of professional office space. This development is located in Battery Park City which is just south of the World Trade Center. The Battery Park Commission selected HII and its co-venturer to develop these two sites as well as several other firms to develop ten other sites. The units will be designed for the luxury market. Information regarding this development is included within this section of the proposal.

In addition, HII Corporation has been selected to develop a hotel, office and retail complex in the 42nd Street Redevelopment project area in Manhattan. It is anticipated that through the efforts of the New York State Urban Development Corporation, this whole area will be redeveloped to also include the redevelopment of the theatres and the introduction of a wholesale merchandise mart of approximately 2½ million square feet. Information with respect to this development is also included within this section of the proposal.

On a preliminary basis, HII is considering other conventional projects as well as a Section 235 development. Finally, HII is currently negotiating the take-over of 2300 units of scattered-site "distressed" housing in the Roxbury and Dorchester areas of Boston. The take-over of these properties is subject to the availability of federal subsidies to insure that these properties can be rejuvenated physically, socially and economically.

42ND STREET REDEVELOPMENT PROJECT

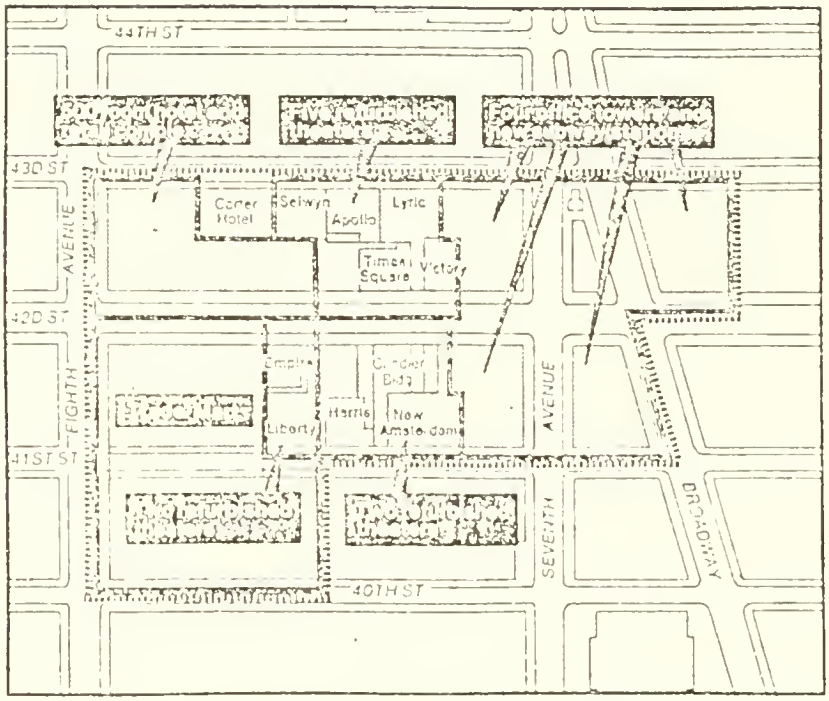
Site 7 Project Synopsis

Developer:	HII Corporation and Planning Innvoations, Inc. (HII/PII) Contacts: E. Anthony Mackall, Principal Planning Innovations, Inc. 500 Eighth Avenue New York, N.Y. 10018 (212) 564-9187 Thomas F. Welch, Vice President HII Corporation One Court Street Boston, MA 02108 (617) 720-1716
Arch./Design Consultant:	Stull Associates, Inc. Donald Stull, FAIA (617) 426-0406 Collins, Medina and Haggerty, Inc. Ernesto Medina (212) 477-5075
Attorney:	Demov, Morris, Levin & Shein Robert C. Hammerling/Peter Korda (212) 757-5050
Project Type:	Mixed-Use Development
Site Control:	99-year Ground Lease with the New York State Urban Development Corporation
42nd Street Project Area:	The 42nd Street Redevelopment Project is located on the westside of midtown Manhattan. It forms the link between the Times Square Theatre/Entertainment Section and New York City's Fashion District. The Project is bounded by 43rd Street on the north; 40th Street on the south; Broadway/7th Avenue on the east; and 8th Avenue on the west.
Overall Development Plan:	The 42nd Street Project includes the development of approximately four million square feet of commercial space; the development of a wholesale merchandise mart with approximately two and one-half million square feet of space; the restoration of approximately ten theaters along 42nd Street between 7th and 8th Avenues for legitimate theatre uses; and the development of an approximately seven hundred thousand square foot mixed-use complex (Site 7).*

Site 7 Location and Identification:	Site 7 is located on the northeast corner of the intersection of 42nd Street and 8th Avenue, diagonally across from the Port Authority Bus Terminal and directly across 42nd Street from the planned Merchandise Mart. Site 7 extends to 43rd Street on the north and includes 400 feet of frontage on 42nd Street between 8th and 7th Avenues. Site 7's land coverage is approximately 57,500 square feet in an "L" configuration.
Site 7 Development Plan:	The project is to be developed as a mixed-use complex with three major components; hotel, office and retail/entertainment. Its estimated height is 450 feet.* The hotel component will be a first-class hotel of approximately 600 rooms and/or suites.* The office component will provide approximately 267,000 square feet for first-class office and specialty commercial uses.* The retail/entertainment component will have as much as 113,000 square feet of space for shops, restaurants, cinemas, a nite club and other entertainment uses.* The anticipated start of construction is the first quarter of 1985; and the projected commencement of business is 1/88.
Project Sponsors:	The 42nd Street Redevelopment Project is jointly sponsored by the New York City Public Development Corporation/City Planning Commission and the New York State Urban Development Corporation.

*Site 7's programming and space-use allocations are subject to revisions.

LOCATOR MAP FOR 42ND STREET REDEVELOPMENT PROJECT



The New York Times/April 7, 1982

Plan for redeveloping 42d Street area.

INTRODUCTION

The 42nd Street Redevelopment Project (42nd Street Project) is the largest undertaking of its kind in New York City's history. The redevelopment plan encompasses 13 acres in the Times Square/ 42nd Street District and includes:

- four office towers
- New York City's first wholesale merchandise/fashion mart
- a first-class hotel, office, retail complex
- the restoration of ten theatres
- the refurbishing of the Times Square/42nd Street subway station.

By virtually all accounts the 42nd Street Project represents the single-most important effort planned for development in New York City. In addition to its outstanding "crossroads" location, the project is accorded such stature because, when developed, it will address and should significantly improve several of the City's major problem areas.

Economically, this project will directly and quite favorably impact on the fashion/garment, entertainment, tourist, hospitality and of course, construction industries. Furthermore, the quantum growth triggered by the 42nd Street Project and the thousands of employment/new business opportunities as well as the hundreds of millions of dollars in increased revenues resulting from its development, should not erode over time. Thus, New York's, on-going struggle to curb the perils of industry stagnation and forced corporate relocation will be significantly aided by this project. Its completion will also mark a milestone in the efforts of the public and private sectors to jointly address these problems fundamentally, integrating comprehensive urban planning and design

strategies with straightforward economic development objectives.

Aesthetically, the project area's redevelopment should prove to be the key component in the City's efforts to convincingly present the Times Square/42nd Street District as a clean and attractive entertainment destination. This district is already the locus of the world's greatest concentration of legitimate theatres and cinemas and a revitalized project area should serve as one of New York's best advertisements. The much needed "new look" that a clean, architecturally interesting, yet still kinetic project area provides, will open Times Square's usage to a broader base of local residents as well as encourage more extended use by national and international visitors.

* * * * * * * * * *

The mixed-use development planned by HII/PII for site 7 will include a hotel, professional offices and a retail and entertainment complex. Its programming, while preliminary represents the careful deliberations of competent development professionals. The decision to build a mixed-use facility reflects HII/PII's attentiveness to the site's physical characteristics and market potentials. Site 7, while planned to contain a mixed-use facility, must also succeed as an integral part of the overall 42nd Street redevelopment effort (which in its own right features a multiplicity of uses). This means that the component uses on site 7 must not only complement one another but that their synergy should also enhance the economics and complete the aesthetic statement of the overall project.

THE NEW YORK TIMES, TUESDAY, APRIL 6, 1982

L B3

3 Main Builders Are Named For Times Sq. Construction

By EDWARD A. GARGAN

Three developers have been chosen by New York City as the primary builders for the Times Square redevelopment plan, according to a senior official in the Koch administration.

The plan is a sweeping scheme designed to revitalize the area. It involves the construction of skyscrapers, a rehabilitated row of legitimate theaters along West 42d Street and a new merchandise mart for the garment industry.

The developers named are Park Realty, owned by George Klein, a major builder of commercial high-rise towers in Manhattan, the Morse family of California and Housing Innovations/Planning Innovations.

The master plan, developed by the state's Urban Development Corporation, calls for the building of office space, a merchandise mart that is to straddle 41st Street opposite the Port Authority bus terminal, and perhaps the construction of a hotel. Also involved is the preservation of an undetermined number of the theaters along 42d Street between Seventh and Eighth Avenues.

Developers from five states and Canada filed 26 proposals last year — far more than the city expected — for the renovation of the Times Square area.

At stake is perhaps $1 billion in construction projects under the the direction of the city's Public Development Corporation and the Urban Development Corporation. The latter has recently achieved dramatic success in starting construction of Battery Park City, a luxury residential project, and the New York City Convention Center.

Each Times Square developer was assigned to a specific segment of the redevelopment area. Park Tower, which received the largest contract, will build four skyscrapers, each with one million square feet of space, at Seventh Avenue and 42d Street and Broadway and 42d Street. The company will also undertake the rehabilitation of the rambling Times Square subway station.

Merchandise Mart Planned

A 2.5-million-square-foot merchandise mart, long sought by the garment industry, will be built by the Morse family between 40th and 42d Streets across Eighth Avenue from the bus terminal. The third developer, Housing Innovations, has won the right to build a 500-room hotel on Eighth Avenue between 42d and 43d Streets.

Although the city and state have accepted the initial proposals from the three developers, each proposal must undergo a rigorous review by the affected community boards, the City Planning Commission and the Board of Estimate. This process will take at least six months.

Other difficulties, according to Herbert J. Sturz, the chairman of the City Planning Commission, include the possibility of prolonged civil suits by the owners of the numerous pornographic book stores in the area. This could delay construction indefinitely.

NEW YORK POST,

TUESDAY, APRIL 6, 1982

4 developers named in 42d St. rehab plan

By STEVEN MARCUS

FOUR DEVELOPERS were formally designated by the city today to carry out a $1 billion plan for revitalizing W. 42d St. between 7th and 8th Avenues, one of the sleaziest blocks in the Times Square area.

In a block now infested with prostitutes, drug pushers and pornographic book stores and movie houses, the developers will construct four new office towers, a wholesale trade mart and a 500-room hotel.

In addition, nine Broadway theaters, most of which are now used to show movies, will be renovated and returned to use as legitimate theaters.

Mayor Koch, who announced the selection of the developers at a City Hall news conference, called the project the largest of its kind in the history of the city.

He asserted that — unlike the numerous plans for revitalizing Times Square that have been announced over the past several years, but have gone nowhere — this one would be carried out.

Officials for the city and state Urban Development Corp., the city's partner in the plan, said they hoped final approval from the Board of Estimate and the UDC Board would be forthcoming in the late fall, and construction could begin early next year.

The officials said they estimated the project could be completed by the late 1980s.

The developers and the projects they will build are:

- Park Tower Realty Corp., which is owned by Barton's Candy heir George Klein, will construct four office towers containing 3.9 million square feet at the intersection of Broadway, 7th Av. and 42d St. Park Tower will also renovate the Times Square subway station, and help pay for the restoration of the theaters.
- New York Mart, a partnership headed by the Morse family, which operates the California Mart in Los Angeles, will construct a 2.4 million square foot wholesale trade mart on 8th Av. between 40th and 42d Streets.
- Housing Innovations Planning Innovations, a minority business enterprise, will construct a first class hotel on 8th Av. between 42d and 43rd Streets containing 500 rooms and 70,000 square feet of retail space.
- The Nederlander Organization will refurbish the Amsterdam and Harris Theater, now used as movie houses, for use as legitimate theaters. Seven other theaters will also be refurbished.

Planning for the project began nearly two years ago.

The developers have agreed to a schedule of payments in lieu of real estate taxes. But city officials said that the payment schedule will provide the developers with the equivalent of a 50 per cent tax statement over 15 years.

BATTERY PARK CITY PHASE II-RESIDENTIAL (BPC II)

Project Synopsis

Developer:	Hudson River Associates Contacts: Thomas F. Welch, Vice President HII Corporation One Court Street Boston, MA 02108 (617) 720-1716 E. Anthony Mackall, Principal Planning Innovations, Inc. 500 Eighth Avenue New York, N.Y. 10018 (212) 564-9187
Architect:	Bond Ryder Associates J. Max Bond, Jr., A.I.A. (212) 666-9551
Interior Arch./Design Consultant:	Collins, Medina & Haggerty, Inc. Ernesto S. Medina (212) 477-5075
Attorney:	Demov, Morris, Levin & Shein Robert C. Hammerling/Peter Korda (212) 757-5050
Project Type:	"For Sale": Luxury Leasehold Cooperative or Condominium Apartments with Ground Level Retail and Office Uses.
Site Control:	86-Year "Financeable" Ground Lease with Battery Park City Authority (BPCA).
BPC II Location:	BPC II is located along the Hudson, south of the BPC Commercial Center (6 million s.f.) and the Phase I Gateway Plaza luxury rental project (1700 DU's). BPC II will consist of 12 buildings (containing approximately 2.1 million s.f. of built space) sited on the four blocks surrounding the extension of Rector Street. A landscaped public park, Rector Park, (reminiscent of Gramercy Park) will be constructed in the center of the development.
Site Identification and Proximity:	HII/PII team is developing sites A and L, which are situated on opposite corners of Rector Place. Both sites will front the south side of Rector Park.
Anticipated Completion:	1984.

Site Dimensions:	(1) Site A approx. 18,000 s.f. (2) Site L approx. 26,000 s.f.
Maximum Allowable Floor Area:	(1) Site A approx. 109,000 s.f. (2) Site L approx. 141,000 s.f. plus parking facility
Height:	60-80 feet
Number of Dwelling Units:	(1) Site A ± 63 Dwelling Units (2) Site L ± 75 Dwelling Units
Residential Program:	The apartments will be designed for and marketed to an upper income/luxury tenantry. It is anticipated that there will be apartments ranging in size from 3 rooms to 6 rooms. Examples of typical units are: a. 3 to 3½ rooms; Living and Dining Areas, Kitchen, 1½ Baths, Spacious Closets, Terrace, Bedroom. Maximum 950 square feet.* b. 4 to 4½ rooms; Living Room, Dining Room/Area, Kitchen, 2½ Baths, Walk-In Closets, Spacious Terrace, Master Bedroom, Bedroom/Den/Office/Media Room. Maximum 1300 square feet.* c. 5 to 6 rooms; Living Room, Dining Room/Area, Kitchen, 2½ Baths, Walk-In Closets, Spacious Terrace, 2 Master Bedrooms, Bedroom/Den/Office/Media Room. Maximum 1700 square feet.*
Building Amenities:	24 hour Doorman, Valet Parking, Fitness Center with sauna, Meeting & Entertainment Rooms, Laundry Room on each floor, Concierge, Closed Circuit monitoring of all entries and exits and Fire and Theft Alarms.*
Apartment Amenities:	Sunken Living Rooms, Fireplaces, Enclosed Utility Areas (personal washer-dryer, installation outlet), Micro Computer Terminal, Cable Television and Telecommunications Satellite Outlets, Fire and Theft Security Systems, Air conditioning.*
Non-Residential Program:	There will be first class retail and professional office space (approx. 15,000 s.f.) constructed at the ground level within the buildings. It is also anticipated that parking facilities will be constructed both one level below grade and at grade level on site L.

*Subject to change pending selling agent market analyses.

MARKETING CONSIDERATIONS

Location. The joint venture of HII Corporation and Planning Innovations, Inc. is developing two (2) luxury apartment buildings on Sites A and L of the Battery Park City Residential Phase II Development (BPC II). As a component of the Battery Park City new community, BPC II has an outstanding location. It is sited south of the Gateway Plaza luxury rental project and west of the Hudson River. BPC II is just a short walk from the Battery Park City Commercial Center (6,000,000 s.f.), the World Trade Center (6,000,000 s.f.) and the Wall Street financial district. Residents of BPC II who do not work in one of these major business centers will also have quick and easy access to the rapid transit system. Four subways providing service within minutes to Midtown, the East and West sides and Brooklyn are within a few blocks.

In addition to convenience shopping and the financial, medical and dental services provided on-site, both the BPC Commercial Center and the World Trade Center are resources that will present residents with numerous shopping options which include dozens of fashion and department stores. Also, the Greenwich Village and Soho districts are just minutes away, and as international culinary and cultural centers, afford easy access to literally hundreds of restaurants, theaters and galleries.

Community Setting. "The best of both worlds" is perhaps the most accurate description of residential living at BPC II. Residents of BPC II will have the best opportunity of all present-day New Yorkers to enjoy the convenience of immediate access to the City's main business and activity centers while living luxuriously in a tranquil, sylvan setting. Both sites A and L will face the south side of Rector Park, a beautifully landscaped public area to be constructed in the center of the BPC II complex. Rector Park in many ways will be reminiscent of well known Gramercy Park. However, in addition to Rector Park, the residents of BPC II will have tree-lined streets throughout their neighborhood, and they will also have Battery Park Esplanade. This 1.2 mile waterfront park will extend northward along the Hudson from the existing Battery Park. It will actually form the western boundary of BPC II. The explanade will be full of greenery, equipped with park benches and have several pleasant nostalgic features like lamppost lighting, hexagonal pavers and the cobblestones so typical in most of N.Y.C.'s pre-World War II parks.

In an era when shopping malls have become commonplace, another reminder of "old fashioned" New York in this newest of neighborhoods will be the closeness of some stores and shops to the sidewalks; allowing customers easy access as they walk along the street. And while some buildings will have retail areas defined through the use of arcades, care is being taken to insure design compatibility between these areas and those programmed for the predominant residential purpose.

The approximately twelve buildings of BPC II will feature a variety of looks. Creatively designed midrise buildings, highrises and townhouses will complete the much awaited cityscape. There will be residences with rounded corners, point-tower edifices, structures with stone bases and even buildings with sculpted facades. The mix of housing types has been well conceived and should make for an interesting community. With such complements as a park at the front door, an abundance of greenery and the esplanade along the Hudson, a real "sense of place" will be created at BPCII, enhancing its success, both financially and as a community.

Quality of Product. Considerable planning took place during the pre-construction phases of BPC II to insure that every aspect of the project would maintain standards of exceptionally high quality. The treatments of the buildings received special attention from the Battery Park City Authority (BPCA), the project's sponsor, particularly regarding the quality of materials, facades, heights, massing and variety. In an extremely detailed set of design guidelines, the BPCA's design consultant, Cooper-Eckstut, has presented a foundation upon which an esthetically pleasing, well built, highly compatible, yet distinctive and unique array of residences can be developed. While the design guidelines are extensive in detailing what "is" and "is not" allowable, they are essentially very good quality controls. They have not limited the project's developers but, in fact have served to encourage creativity.

The BPCA through its highly competitive selection process designated six developers capable of producing buildings that are representative of the "best of New York City". That is, capable of efficiently producing individually outstanding structures that are collectively in harmony with their surroundings. In addition to the design guidelines, another quality control is the on-going design-review process between each developer and the BPCA. Through this process the architects for each residence as well as their respective designs were seriously reviewed before approvals to proceed further were given.

HII CORPORATION

REAL ESTATE DEVELOPMENT • NATIONWIDE

INTRODUCTION

Since 1966, HII Corporation (HII) has developed, as owner-developer, over $80 million of newly constructed and rehabilitated housing (over 2100 units). The Principal of HII is Denis A. Blackett, the company's founder and current president. Trained as an architect and structural engineer, he has guided the company's growth in the area of unusual and challenging real estate developments.

CURRENT ACTIVITIES

HII has recently completed three developments which total 587 units with a mortgage value of approximately $24 million. These developments include the conversion (to housing) of a hotel in Oakland and two public schools and a factory in Boston. Each of these buildings has been placed on the National Register of Historic Places.

In addition, HII has currently in construction a 299 unit rehabilitation of an historic office building in downtown Los Angeles, a 141 unit development in Baltimore, and 84 units in Boston (total value in excess of $30 million). HII is also planning to convert schools in Upstate N.Y. and Westchester County to condominiums, and to build new condominium and cooperative units in Harlem and Battery Park City on Manhattan Island (projected sellout of proposed units in excess of $70 million.)

HOTEL OAKLAND
OAKLAND, CA.

The historic Hotel Oakland is one of Oakland's most important landmarks — because of its architectural character, its size, the role that it has played in the community from 1912 until after World War II and its proximity to downtown and Lake Merritt. This nine-story building, which has been designated as an historic structure, has been converted into 315 units of housing for the elderly. At the ground level, there is 20,000 square feet of commercial space in restored areas of substantial architectural quality. Each of the commercial areas is entered directly from the street and commercial uses are completely separated from residential circulation. The resident entry is through the 3,280 square foot main lobby which faces 13th Street and has a restored, gold leaf vaulted ceiling with a height of approximately forty feet.

LOBBY DURING RESTORATION

Number of Units: 315; *Type of Project:* Rehabilitation; *Mortgage Amount.* $15,617,000; *Mortgage Financing: Tax-exempt 11(b) Oakland Housing Authority, United California Bank; Wells Fargo, Crocker National; Equity Financing:* The Langelier Company, Inc., E.F. Hutton; *General Contractor:* Trans-Bay Engineers & Builders, Inc., W & B Constructors, Inc.; *Architect:* The Ratcliff Architects; *Management:* Tenant Services, Inc. National Register of Historic Places; *Status:* Fully Occupied — October 1980.

SCHOOLHOUSE '77
BOSTON, MA.

Schoolhouse '77 . . . combines rehabilitation and new construction . . . creating 128 family and elderly housing units. The recycling of 3 brick buildings (2 abandoned schools and a factory) not only resulted in the further stabilization of the neighborhoods, but each structure has been placed on the National Register of Historic Places. The project utilized as much of the existing buildings as possible while at the same time provided many of the amenities associated with new construction. All three and four bedroom apartments have separate entries from the street. The 4th building is new construction consisting of 40 units for the elderly.

This development represented the first tax-exempt 11(b) mortgage financing in the Commonwealth of Massachusetts.

DILLAWAY SCHOOL NATIONAL REGISTER OF HISTORIC PLACES — 1980

Number of Units: 128; *Type of Project:* Rehabilitation/New Construction; *Mortgage Amount:* $5,505,100; *Mortgage Financing:* Tax exempt 11(b), Boston Housing Authority, Merrill Lynch; *Equity Financing:* The Langelier Company, Inc., E.F. Hutton; *General Contractor:* Keyes Construction Corp.; *Architects:* Boston Architectural Team, Inc.; Equity Design, Richard H. Walwood Architect, Inc.; National Register of Historic Places; *Management:* Tenant Services, Inc.; *Status:* Fully Occupied — August 1980

GARRISON SCHOOL
NATIONAL REGISTER OF HISTORIC PLACES - 1980

CONCORD HOUSES
BOSTON (South End) MA.

Concord Houses consists of 2 seven-story brick buildings, one primarily for the elderly and the other for small families. Built in 1974 in an historic neighborhood of Victorian bowfront townhouses, the buildings have brick facades and projecting bay windows and are carefully designed to complement the neighborhood's 19th century architectural character. Ten three and four bedroom first-floor apartments have off-the-street entries completely separate from the elevator circulation to the upper floor one and two bedroom apartments. The development is within walking distance of the Prudential Center and the Hancock Tower.

Number of Units: 181 (86 of the units are for the elderly); *Type of Project:* New Construction; *Mortgage Amount:* $5,272,048; *Mortgage Financing:* Massachusetts Housing Finance Agency; *Equity Financing:* National Corporation for Housing Partnerships; *General Contractor:* Barkan Construction Company, Inc.; *Architect:* Glaser/deCastro/Vitols Partnership; *Management:* Tenant Services, Inc.; *Status:* Fully Occupied — February 1976

GIRARD AVENUE (Bergen Circle) SPRINGFIELD, MA.

Bergen Circle consists of a seven-story high-rise containing 161 one and two bedroom units, 7 two-story townhouse buildings which contain 40 three and four bedroom units, and a commercial building with approximately 12,000 sq. ft. of floor space. Ninety-one units designed especially for the elderly are in a wing separate from the wing for small families. Each wing has its own community room.

Prior to HII's participation, the project suffered from a checkered development history with numerous architectural, construction, and development groups having tried and failed on the same site. HII took over the "distressed" project in 1974, completely restructured the development team and redesigned and completed the project in 1976.

Number of Units: 201 (91 of the units are for the elderly); *Type of Project:* New Construction; *Mortgage Amount:* $7,381,100; *Mortgage Financing:* Massachusetts Housing Finance Agency; *Equity Financing:* The March Company; Shearson Hammill Hayden & Stone; *General Contractor:* Ley Construction Company; *Architect:* Glaser/deCastro/Vitols Partnership; *Management:* Tenant Services, Inc.; *Special Features:* Swimming Pool, Tennis Court, Commercial Space; *Status:* Fully Occupied — July 1976.

I.N. VAN NUYS BUILDING LOS ANGELES, CA.

The I.N. Van Nuys Building is located in the *National Register Historic District* of South Spring Street—once known as the "Wall Street of the West." Architecturally, the district presents an almost homogeneous streetscape of Beaux-Arts structures in Classical and Art Deco styles complemented by several Modern structures. The Van Nuys Building was constructed in 1911—in a classical style with Italianate details. Its ornate lobby, copper elevators, marble staircases, as well as the exterior design made it a prestigious address for commercial enterprises until the 50's. The rehabilitation of this 11 story structure represents a significant step in the process of the revitalization of this Historic District and it will serve a substantial elderly housing need as well as provide specially designed units for the visually impaired and handicapped.

Number of Units: 299; *Type of Project.* Rehabilitation; *Mortgage Amount* $20,216,000; *Mortgage Financing:* Section 11(b) Construction Loan and FNMA/GNMA Tandem Permanent Loan, Community Redevelopment Agency, Merrill Lynch, Citibank; *General Contractor:* Trans-Bay/W & B Constructors, Inc.; *Architect:* Edward C. Barker & Associates; *Management.* Tenant Services, Inc.; National Register of Historic Places (pending); Commercial Space - 22,077 sq. ft.; *Status:* Construction started October 1980.

I.N. VAN NUYS BUILDING NATIONAL REGISTER OF HISTORIC PLACES - 1979

STAFF

HII has a small but balanced staff that includes an architect, a former mortgage officer, several MBA's, MP's, ME's and a licensed builder. HII also has an affiliate — Tenant Services, Inc. (TSI) — which manages over 2000 units of housing. This staff, with its wide range of specialties, allows HII to focus on all of the critical development issues of site selection, feasibility, marketing, construction financing, sales and property management.

FINANCING

HII has traditionally focused on complex urban projects requiring unusual financial structuring. Equity financing has been obtained from both venture capital and tax shelter firms and from such well known Wall Street institutions as Morgan Guaranty Trust and E.F. Hutton. Over $20 million has been raised in this fashion based in part upon the advantageous tax treatment of historic structures. Debt financing has utilized tax exempt bonds and mortgages for both interim and permanent financing. This has required the cooperation of local redevelopment and housing agencies as the tax exempt issuer. Over $50 million has been raised through such institutions as United California Bank, Merrill Lynch, and Citibank.

NEW DIRECTIONS

Despite current economic conditions HII foresees significant growth for upper income and luxury housing in carefully selected areas (e.g. Westchester County, Battery Park City). We will continue to focus on major urban developments and to undertake those developments whose rewards are commensurate with their complexities. In particular we see growth in several non-residential areas and are actively pursuing various hotel and office building opportunities. Over 80% of our new development work is outside the City of Boston. We are a national company with a decided urban focus and a special interest in the East, Mid-Atlantic, and Southeast regions of the country, as well as the West Coast.

HARLEM—STRIVER'S ROW

LOWER MANHATTAN
BATTERY PARK CITY (foregroun

DESIGN K POWELL ASSOC

HII CORPORATION
One Court Street • Boston, MA 02108

RESUMES

MARCIA Y. ANDERSON

EDUCATION: BARNARD COLLEGE, COLUMBIA UNIVERSITY
Bachelor of Arts, Sociology

PROFESSIONAL EXPERIENCE:

1977–Present
Senior Vice President
Director of Property Management
TENANT SERVICES, INC.
Responsible for providing quality management services to all units. General responsibilities are to assure that they receive prompt, efficient, courteous and quality service through day-to-day supervision of the administration (comprising of a staff of 100 employees) and through general monitoring of the physcial and fiscal operation of the developments. Coordinate an on-going training program for Property Managers

1974–1977
Administrative Assistant
TENANT SERVICES, INC.
Assisted Director of Property Management in establishing and implementing general policies regarding personnel, tenant selection, rent collection, preventive maintenance, evictions, janitorial care, energy conservation. Assisted in the development of a training program for Property Managers.

1972–1974
Housing Management Assistant
U.S. DEPARTMENT of HOUSING and URBAN DEVELOPMENT
Administered HUD's reponsibilities for budget analysis and funding, tenant-management relations and evaluation of local public housing authorities and HUD-insured developments.

Urban Intern
U.S. DEPARTMENT of HOUSING and URBAN DEVELOPMENT

AFFILIATIONS:
Former Co-chairperson, New England Black Property Managers Forum
Member, Barnard City Alumnae Group
Past Member, Board of Directors for Area II Home Care for Senior Citizens
Chairperson, A.R.M. Committee of Institute of Real Estate Management
Citizens Advisory Committee for Massachusetts Housing Courts

DENIS A. BLACKETT

EDUCATION:

MASSACHUSETTS INSTITUTE OF TECHNOLOGY
Bachelor of Architecture

MASSACHUSETTS INSTITUTE OF TECHNOLOGY
Master of Civil Engineering (Structural)

Fulbright Scholar (1962) Italy

PROFESSIONAL EXPERIENCE:

1966–Present	Real Estate Developer HII CORPORATION President
1972–Present	Property Manager TENANT SERVICES, INC. President
1963–1966	BOSTON REDEVELOPMENT AUTHORITY Urban Designer and Planner
1965–1968	Advocate Planner URBAN PLANNING AID Director
1953–1962	Architectural and Engineering Designer SKIDMORE, OWINGS and MERRILL, Chicago ULRICH FRANZEN, New York SOUZA and TRUE, Cambridge

AFFILIATIONS:

Past Director, Massachusetts Port Authority
Corporator, Provident Institution for Savings
Director, V.P., National Housing Rehabilitation Association
Member, Builders Association of Greater Boston
1979 Black Enterprise Achievement Award
Member, Urban Land Institute

RESUMES

MARCIA Y. ANDERSON

EDUCATION: BARNARD COLLEGE, COLUMBIA UNIVERSITY
Bachelor of Arts, Sociology

PROFESSIONAL EXPERIENCE:

1977-Present
Senior Vice President
Director of Property Management
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Urban Intern
U.S. DEPARTMENT of HOUSING and URBAN DEVELOPMENT

AFFILIATIONS:
Former Co-chairperson, New England Black Property Managers Forum
Member, Barnard City Alumnae Group
Past Member, Board of Directors for Area II Home Care for Senior Citizens
Chairperson, A.R.M. Committee of Institute of Real Estate Management
Citizens Advisory Committee for Massachusetts Housing Courts

DENIS A. BLACKETT

EDUCATION:	MASSACHUSETTS INSTITUTE OF TECHNOLOGY Bachelor of Architecture MASSACHUSETTS INSTITUTE OF TECHNOLOGY Master of Civil Engineering (Structural) Fulbright Scholar (1962) Italy
PROFESSIONAL EXPERIENCE:	
1966–Present	Real Estate Developer HII CORPORATION President
1972–Present	Property Manager TENANT SERVICES, INC. President
1963–1966	BOSTON REDEVELOPMENT AUTHORITY Urban Designer and Planner
1965–1968	Advocate Planner URBAN PLANNING AID Director
1953–1962	Architectural and Engineering Designer SKIDMORE, OWINGS and MERRILL, Chicago ULRICH FRANZEN, New York SOUZA and TRUE, Cambridge
AFFILIATIONS:	Past Director, Massachusetts Port Authority Corporator, Provident Institution for Savings Director, V.P., National Housing Rehabilitation Association Member, Builders Association of Greater Boston 1979 Black Enterprise Achievement Award Member, Urban Land Institute

RICHARD M. LAPPIN

EDUCATION:	DARMOUTH COLLEGE Bachelor of Arts 1968 COLUMBIA UNIVERSITY Master of Business Administration 1970
PROFESSIONAL EXPERIENCE:	
1972-Present	Real Estate Developer and Housing Consultant HII CORPORATION Senior Vice President for Development Senior Vice President for Finance
1970-1972	Project Manager-Consultant and Comptroller HACKETT HOUSING SYSTEMS, INC., Washington, D.C. Assistant to the President with responsibility in project and business management.
1969 (summer)	Management Assistant KING-BISON COMPANY, Boston, MA Developed and implemented construction and financial management systems.

RUTH M. LOUIE

EDUCATION:

RUTGERS UNIVERSITY
Master of City and Regional Planning 1973

BARNARD COLLEGE, COLUMBIA UNIVERSITY
Bachelor of Arts, Environmental Conservation and Management 1971

HARVARD GRADUATE SCHOOL OF DESIGN
Completed courses: Development of Real Property,
Condominium Conversions 1979-1980

PROFESSIONAL EXPERIENCE:

1979-Present

Real Estate Development
HII CORPORATION
Vice President for Development
Responsible for full range of development activity from site acquisition through construction phase. Mid-Atlantic region coordinator, Baltimore office.

1975-1979

Principal City Planner
BALTIMORE CITY DEPARTMENT of PLANNING
District Planner and Chief of Planning
Section responsible for neighborhood planning efforts in Baltimore. Assistant to Mayor's Physical Development Coordinator. Major work included preparation of area plans and special studies.

1972-1975

Planning Consultant
TRANS URBAN EAST ORGANIZATION, New York
MATCH INSTITUTION, Washington, D.C.
Worked for two consultant firms, provided technical assistance to small communities with minority elected officials in North Carolina, Florida, Alabama. Directed a planning research project in Baltimore, Maryland.

AFFILIATIONS:

Member, American Planning Association (APA)
Member, American Institute of Certified Planners (AICP)
Member, National Leased Housing Association

JOSEPH T. POLONSKI

EDUCATION:	SUFFOLK UNIVERSITY Business Administration 1957
PROFESSIONAL EXPERIENCE:	
1975-Present	Vice President for Finance and Marketing TENANT SERVICES, INC. Responsible for all financial and marketing activities
1973-1975	Controller CULVER ADVERTISING
1970-1973	Assistant Controller CONSOLIDATED MOTOR INNS Managed all accounting functions at the home office and at each property. Responsible for financial and operational audits at field locations.
1966-1970	Controller THE CODMAN COMPANY, INC. Controlled all accounting and reporting to owners serviced by property management division. Responsible for administration of staff, taxes, insurance, bank relationships, and systems development.
1954-1970	ATLANTIC LUMBER COMPANY, INC. Progressed from any entry level position to accountant reporting to the controller.
AFFILIATIONS:	Certified Property Manager Real Estate Broker, Commonwealth of Mass. Member, Greater Boston Real Estate Board Member, Community Associates Institute Notary Public, Commonwealth of Mass. Member, National Association of Accountants Member, Institute of Real Estate Management

WILLIAM J. SWEENEY, JR.

EDUCATION:

MASSACHUSETTS INSTITUTE OF TECHNOLOGY
Bachelor of Science (Industrial Management)
Graduate Study in Building Engineering
Master of Science (Civil Engineering)

PROFESSIONAL EXPERIENCE:

1979–Present

Construction Manager
HII CORPORATION
Responsible for design and construction of new and rehabilitated projects, nationwide.

1977–1979

Project Manager
UNIVERSITY OF PENNSYLVANIA
Administration of design, construction, procurement, and financial control of teaching hospital, research, and office facilities, a $50 million project.

1971–1976

Project Manager
MASSACHUSETTS INSTITUTE OF TECHNOLOGY
Administration of design and construction of 684 units of housing in three high-rise projects in Cambridge, Massachusetts.

1964–1970

Construction Management Consultant

Senior Associate
HARBRIDGE HOUSE, INC., Boston, MA

Research, consulting and education in construction management for builders, developers and owners. Organizational studies for major United States and Canadian housing developers. Training programs for governmental contracting officers and private contractors in contract administration and related topics. Evaluation of government and corporate project management systems.

THOMAS F. WELCH

EDUCATION:	MASSACHUSETTS INSTITUTE OF TECHNOLOGY Master of City Planning (Urban Land Development) 1973
PROFESSIONAL EXPERIENCE:	
1975–Present	Real Estate Developer and Housing Consulant HII CORPORATION Senior Vice President for Development Responsible for the full range of developmental activities from land acquisition through construction
1973–1975	Senior Mortgage Analyst/Environmental Officer MASSACHUSETTS HOUSING FINANCE AGENCY Responsible for determining feasibility of proposed projects as regards financial soundness, the capabilities of developmental team members and responsivenes of proposed development to documented housing needs and environmental concerns.
AFFILIATIONS:	Past Associate Member, American Institute of Planners Past Member, National Association of Housing Specialists Member, (Boston) Black Housing Task Force Director, Tenants' Development Corporation

NEWS ARTICLES

Los Angeles Times Part VIII/Sunday, January 11, 1981

Office Conversion Revitalizing L.A.

Spring St. Apartment Building Project Follows Telephone Co. Recycling

By DAVID M. KINCHEN, *Times Staff Writer*

The $24-million conversion of the I.N. Van Vuys Building on Spring Street to housing for the elderly and handicapped continues the trend begun two years ago with the similar conversion of the old Pacific Telephone building at 740 S. Olive St.

Like the Olive Street conversion, which has 310 dwelling units and retail space on the first floor, the 70-year old Van Nuys Building at 7th and Spring streets is being converted to a 299-unit

Commentary

apartment building with retail and commercial space on the first floor. Completion is scheduled for mid-1983.

The efforts of the Maguire Partners with 740 S. Olive continued the momentum of the South Olive Street revitalization; Van Nuys Associates, the limited partnership involved with the Van Nuys Building could perform a similar role on Spring Street.

To a New Yorker, accustomed to mixed-use buildings from Greenwich Village to Midtown Manhattan and points beyond, the conversion is nothing out of the ordinary.

Chicagoans can point to the John Hancock Building—half condominiums and half office space. It was built more than 10 years ago with apartments and offices.

Los Angeles, however, has been so suburban oriented from its early days that the concept of housing and commerce in the same structure has not taken root here to any great extent.

The Wilshire District and Hollywood have some buildings of this type, but they aren't a major component of the housing stock in Los Angeles.

Mayor Tom Bradley praised Denis Blackett, president of the Boston-based Housing Innovations Inc., the black-owned parent company of Van Nuys Associates, the limited partnership that is converting the historic building.

Similar praise came from Councilman Gilbert Lindsay, who has long sought black involvement in revitalization in his district.

The architects—Edward C. Barker & Associates—have wisely decided to keep the exterior as orginal as possible and concentrate on the interior.

Bradley said last Monday that the Van Nuys Building will be the largest housing development ever undertaken in the Central Business District since redevelopment activities got under way in 1974 but the former telephone company has 11 more apartments than the Spring Street building.

He may have been thinking of the cost: the Maguire Partners revitalization of the telephone company building cost about half of the estimated $24 million that will be spent on the Van Nuys Building.

The latter is being financed in part by more than $20 million in tax-exempt bonds sold by the Community Redevelopment Agency (CRA). Tenants who qualify to live in the complex will pay 25% of their adjusted monthly income, the same percentage that tenants pay in the Olive Street building.

Blackett said that 48 of the 299 units in the Van Nuys Building will be designed specifically for the blind, while another 30 units will be set aside for the physically handicapped.

Developers of similar conversions have to contend with often balky city officials who don't recognize that Spring Street will never again be the Wall Street of the West. That title is held by Flower and Figueroa streets here and Montgomery Street in San Francisco.

Obviously Blackett had powerful allies in Bradley and Lindsay, powerful enough to combat the long-time opposition in this city of developments combining housing and retail and commercial uses.

Once this fear of mixed-use buildings is overcome, housing for non-elderly persons can be created out of the magnificent buildings lining Spring Street from 7th north to 4th streets.

City of Los Angeles

PROCLAMATION

Minority Participation in Downtown Redevelopment

DAY

WHEREAS, LOS ANGELES' FOUNDERS WERE MESTIZOS, INDIANS, MULATTOS, TOMATARDS AND BLACKS WHO, 200 YEARS AGO, HAD THE COURAGE, THE WISDOM AND THE VISION TO TRANSFORM THIS RUGGED FRONTIER INTO THE PUEBLO DE LOS ANGELES; AND

WHEREAS, LOS ANGELES HAS ALWAYS BEEN "A CITY ON THE MOVE," AND THEREFORE HAS REMAINED IN A CONSTANT STATE OF REDEVELOPMENT IN WHICH OFFICIALS HAVE ACTIVELY SOUGHT THE PARTICIPATION OF MINORITIES; AND

WHEREAS, IN THIS, THE YEAR OF OUR CITY'S BICENTENNIAL HOUSING INNOVATIONS, INC., A PIONEERING, BLACK-OWNED HOUSING DEVELOPMENT COMPANY, IN THE TRUE SPIRIT OF LOS ANGELES' ORIGINAL FOUNDERS, IS TRANSFORMING A DILAPIDATED OFFICE BUILDING INTO A $22 MILLION RESIDENTIAL COMPLEX FOR SENIOR CITIZENS; AND

WHEREAS, HOUSING INNOVATIONS, IN MAKING SUCH A NEEDED CONTRIBUTION TO THE CITY'S HOUSING INVENTORY, HAS BECOME A WELCOME AND VITAL PARTNER IN THE REDEVELOPMENT OF DOWNTOWN LOS ANGELES AND IS CARRYING ON IN THE TRUE SPIRIT OF THE CITY'S ORIGINAL FOUNDERS;

NOW, THEREFORE, I, TOM BRADLEY, MAYOR OF THE CITY OF LOS ANGELES, DO HEREBY PROCLAIM JANUARY 5, 1981, AS "MINORITY PARTICIPATION IN DOWNTOWN REDEVELOPMENT DAY," A DAY SET ASIDE TO ENCOURAGE MINORITY COMPANIES TO PARTICIPATE IN THE REDEVELOPMENT OF DOWNTOWN LOS ANGELES; AND

FURTHER, COMMEND HOUSING INNOVATIONS FOR BEING A LEADER IN THE REVITALIZATION OF LOS ANGELES.

JANUARY 5, 1981

Tom Bradley
MAYOR

Battery Park City: The Newest Prestige Address

Rector Park Area To Be Strictly Luxury Housing

By ALAN S. OSER

BY fits and starts, Battery Park City is emerging along the Hudson River near the southern tip of Manhattan as New York's premier new housing and commercial development.

Its next production phase of 1,809 apartments is likely to be far more "premier," in fact, than anyone ever imagined: As a result of economic forces no one could have foreseen, luxury-level housing for upper-middle-income or higher-income people is at present the only kind that can be built.

Battery Park City was conceived late in the 1960's, the ebullient era of Nelson A. Rockefeller's governorship, when John V. Lindsay was Mayor. It was a time of economic stability and low financing costs. The idea was that a large new commercial and residential development could be built on the 92 acres of landfill created from the World Trade Center construction. There would be 16,000 units of new housing and a six-million-square-foot office center.

Those numbers have not changed, although the authority commissioned a new master plan by Cooper Eckstut Associates in the 1970's. It shifted the commercial center from the southern tip to the middle of the site, not far from the Trade Center, and altered the design concept away from superblock projects done by one developer to varied but harmonious projects by several architects on smaller sites.

Meanwhile, housing costs and the housing market have changed drastically. What was imagined as a great housing resource for a lower-, middle- and upper-income population working in the office buildings of lower Manhattan and Battery Park City itself is coming forth as a prestigious urban community of first-rate quality.

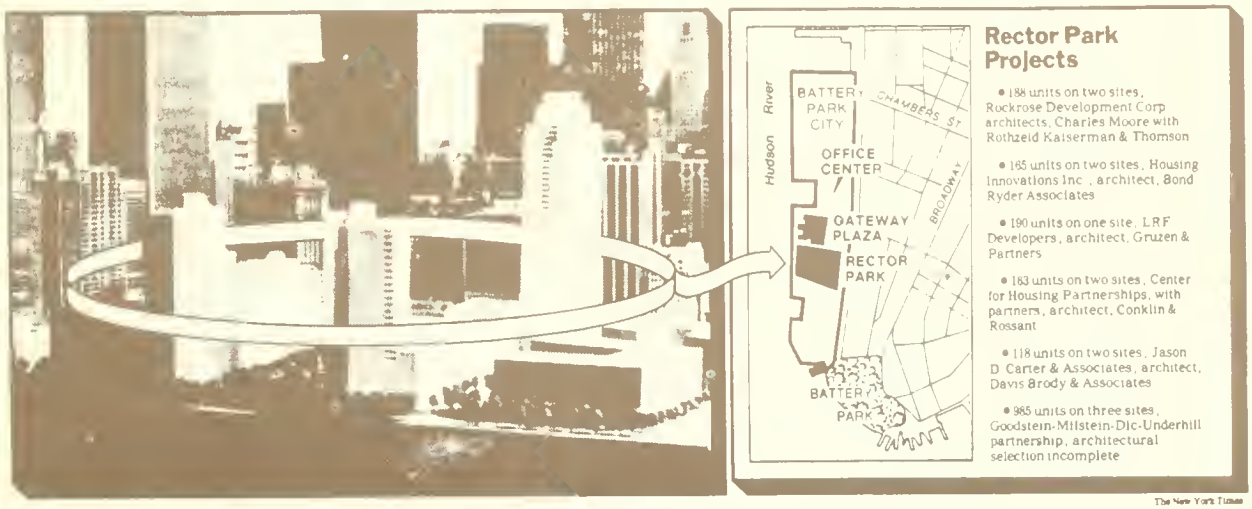
In the forthcoming phase of development, known as Rector Park, town houses costing several million dollars each will be offered for sale amid chic apartments designed by some of the city's most distinguished architects. There is no prospect of subsidies for lower-income housing, and most residents are likely to have incomes of at least $40,000 a year.

It is the prospect of a "Rockefeller Center II" to be produced by Olympia & York Properties in the commercial core, says Richard A. Kahan, chairman and chief executive officer of the Battery Park City Authority, that makes prestige-level residential development possible.

"WE must establish Battery Park City as a high-quality, high-rent neighborhood," he said. This encourages others to build even at high cost, enabling the authority to generate the revenue it needs in the 1980's to meet its responsibilities to bondholders. Two major corporations — CIT Corporation and American Express — have already signed up as tenants in what is expected to be one of the prestige office locations in the East.

The housing market at Battery Park City is already being tested at Gateway Plaza, the first phase of residential construction, by the Lefrak Organization. Plaza 600, the first of its three 34-story buildings, is scheduled to open next month and 70 percent of the 447 apartments already are rented. Ultimately Gateway Plaza will have 1,712 apartments in six buildings.

Seven years ago, when the authority was seeking Federal mortage insurance for this first phase, it predicted that average monthly rents would be $135 a room. In fact, rents have turned out to average $250 a room for the units now being rented — $600 to $675 a



The New York Times

Rendering, enclosed in circle, shows massing of apartment projects planned for Rector Park section of Battery Park City.

month for the 475-square-foot studios, $750 to $900 a month for the 750-square-foot one-bedrooms and $1,100 to $1,350 a month for the 1,000-square-foot two-bedrooms.

Gateway Plaza may look like bargain housing in comparison with the Rector Park housing to come. These 1,809 apartments (including seven superluxury town houses) are to be developed with uninsured conventional financing. If all goes smoothly, the six designated development teams for the 12 sites will sign permanent leases in May and June, the terms of which are currently in negotiation.

Many of the Rector Park projects are likely to be condominiums or cooperatives because some of the developers think they could not get rents high enough to support the high cost of the permanent mortgages needed to finance the buildings. One developer said he anticipated production costs of $140 to $160 a square foot, excluding land rent. At $150 a square foot, the renter of an 800-square-foot apartment (a small one-bedroom) would have to pay $1,580 a month ($19,200 a year) for the debt service on a mortgage covering the development costs. Every change of one percentage point in the interest rate on the building's permanent loan would make a difference of $80 to $85 a month in the rent.

FIGURING in operating costs, land rent and builder's profit, the rent the builder would have to get for such an apartment would be about $2,500 a month. At those prices the higher-income customer may prefer the considerable tax advantages of ownership. At $150 a square foot, an 800-square-foot condominium would cost $120,000 to build. It would sell for more.

On the other hand, some of the builders may be able to produce rental housing at lower cost. In larger projects, economies of scale may allow them to lower the operating costs per square foot of apartment. And, as landlords of rental buildings, they could get their profit in the early years of ownership from the substantial depreciation benefit available to them, which lets them offset taxes on income from other properties.

Two of the prospective developers in the Rector Park projects are believed to be planning rentals — the partnership of Goodstein Construction Corporation, Milstein Properties and the Dic-Underhill Construction Corporation, and the Rockrose Development Corporation. They bid successfully on 1,100 of the total of 1,809 apartments.

In future years, it is possible that the authority may generate enough revenue from Battery Park City to provide the subsidies that alone make units for lower-income people possible. The ultimate economic mix may depend, then as now, on economic conditions and interest rates above all. ■

The New York Times

The New York Times/Don Hogan Charles

Stanton Eckstut of Cooper Eckstut Associates with a model showing the guidelines that developers and architects will be required to follow in designing a housing complex at Battery Park City.

6 Builders Chosen for Housing at Battery Park City

By PAUL GOLDBERGER

Six real-estate companies were named yesterday to develop housing in Battery Park City that would reject the uniformity of other large projects and reflect the diversity of Manhattan neighborhoods

The companies were named by the Battery Park City Authority, which is under the auspices of the New York State Urban Development Corporation The authority plans to have the concerns begin construction early next year on 1,809 units of housing The project is expected to have a major impact on the lower Manhattan skyline

The housing will be built according to urban-design guidelines that require it to contain a mix of town houses, low-rise apartment buildings and high-rise towers, organized around a central park and a series of streets resembling those of the rest of Manhattan

The developers, who will be formally designated by the authority's board tomorrow, are Housing Innovations Inc of Manhattan, the Center for Housing Partnerships of Manhattan, LRF Developers Inc of the Bronx, Jason D Carter & Associates of Manhattan, Rockrose Development Corporation of Manhattan, and a joint venture among the Goodstein Construction Corporation, Milstein Properties Inc and Dic-Underhill Construction Company, all of Manhattan

Of the six companies, only two — Rockrose, which specializes in conversions of old industrial buildings into housing, and the Goodstein and Milstein group, builders of new apartment towers — are well-known Manhattan builders

The six developers were chosen from 27 real-estate companies that responded to a call for proposals issued in April by the New York State Urban Development Corporation

Although the Battery Park City Authority and the Urban Development Corporation control the general design of Battery Park City, many details of the project's final appearance will be up to the individual developers

They were selected on the basis of the guaranteed rent and payment in lieu of taxes each developer was willing to make to the Battery Park City Authority, as well as on their experience and the authority's estimate of their ability to finance and build a project of this size, according to Richard A Kahan, chief executive officer of both the Battery Park City Authority and the State Urban Development Corporation

The new housing will be built on nine acres roughly in the center of Battery Park City, on a site bounded by an extension of Albany Street on the north and West Thames Street on the south It will be to the south of the planned commercial core of office towers to be built by Olympia & York and designed by Cesar Pelli, and just south of a 1,700-unit housing complex of more conventional tower design that is under construction.

This new project will be the first residential construction at Battery Park City since the New York State Urban Development Corporation took over the project and adopted a new master plan for its design in 1979 The master plan, by the urban design firm of Cooper Eckstut Associates, divides this residential site into 12 parcels Each of the developers has been assigned a parcel on which a specific kind of housing, such as 528 units in a high-rise tower, will be required

Although the initial proposal of many

The New York Times Aug 18 1981

developers had included names of architects with whom they wished to work, the authority designated only the developers The developers will choose architects shortly, subject to the authority's approval, Bob Rafsky, a spokesman for the authority, said

While final plans for this project will not be available until the architects have been selected, it is possible to have a close idea of what the result will be. As it had done with all previous phases of construction, the State Urban Development Corporation commissioned Cooper Eckstut Associates to prepare a set of design guidelines which all architects and developers who build at Battery Park City would be required to follow.

The new guidelines represent a significant step for a public agency, in that they reject the look of almost all previous publicly assisted housing. "Variety is purposely sought to avoid any appearance of a 'project' look or superblocks, and instead provide the complexity and interest normally associated with older and more established neighborhoods," the Cooper Eckstut guideline, state.

The guidelines were based on a study by the urban designers of existing New York City neighborhoods. They concluded that the older and relatively unplanned neighborhoods were the city's most successful, and cited the importance of a mix of different types of housing and of the presence of a significant visual or landscape element, such as a park or river view

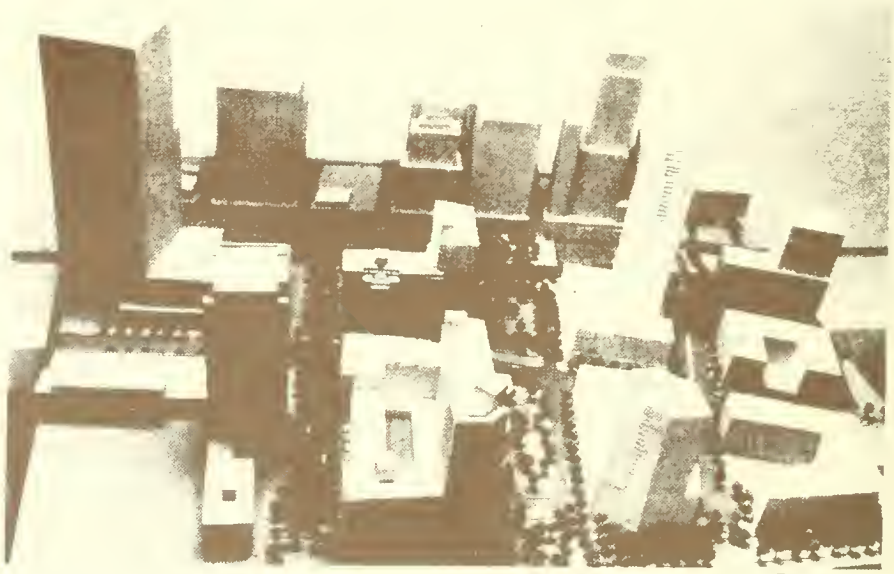
The new residential development will have both amenities It will be bounded on the west by the Hudson River and by the waterfront promenade that will border all of Battery Park City, and it will have in its center on Rector Place a small park modeled loosely on an urban square such as Gramercy Park

'Street Walls' Continued

The buildings will follow old-style, conventional New York construction patterns in that they will be required to be built out to the street line. The planners have rejected the set-back plazas that have been popular in recent years in favor of creating a "street wall" such as those on Fifth Avenue, Central Park West or Riverside Drive

The guidelines encourage fairly flat facades, but suggest strong stone bases and tops made elaborate by setbacks or even by architectural ornament

The notion is to create by artificial means the sort of urban design that tended to occur naturally in the apartment buildings of the 1920's in places such as Central Park West, Gracie Square and Gramercy Park



The New York Times

Model of the design for Battery Park City includes guidelines for construction of residential area, center. While being required to follow the mandated pattern, developers will be free to design many of the details of the project.

Developers for Battery Park City

HOUSING INNOVATIONS Inc.

Housing Innovations is based in Boston and in its six years of existence has done work around the country It has a reported 20,000 units of housing to its credit While Battery Park City will be its introduction to New York as a builder, the firm plans to build rental and cooperative units here in collaboration with local contractors experienced in construction here

GOODSTEIN CONSTRUCTION CORPORATION

Goodstein, founded by Jack Goodstein in 1927, owns and operates more than 6,000 housing units in the city In partnership with DIC-Underhill, it built the Continental Towers, a 37-story apartment building at 301 East 79th Street It built a 29-story combined office and apartment building between 46th and 47th Streets from Second to Third Avenues Among its more recent projects was the 31-story apartment house on the southwest corner of Broadway and 55th Street, the former site of loft buildings

DIC-UNDERHILL CONSTRUCTION COMPANY

DIC-Underhill has done work for the Lefrak and Trump organizations It has worked on the World Trade Center and been involved in the construction of more than 10,000 housing units in joint ventures with the Goodstein and Milstein firms It has also done construction jobs in Saudi Arabia and Iran

MILSTEIN PROPERTIES

A family partnership of Howard, Philip and Edward Milstein, the company remodeled the former Royal Manhattan Hotel on West 45th Street into the Milford Plaza It also owns the Biltmore and Roosevelt Hotels, as well as two Lincoln Plaza Buildings on Broadway between 62d and 64th Streets The company's total portfolio holds 20,000 housing units It was one of the principal developers of Starrett City in Brooklyn Among its pending projects is a 35-story office building south of the World Trade Center to be known as One World Plaza

CENTER FOR HOUSING PARTNERSHIPS

The center is a partnership of Calvin Johnson, an architect and developer, Bill Shaw, a developer active chiefly in the South Bronx, and Desmond Emmanuel, who worked with the Crow Construction Company and has been project manager of the Chemical Bank Building on Park Avenue between 47th and 48th Streets The partnership has done about 1,500 housing units, mostly by rehabilitation

LRF DEVELOPERS

A small developer, the firm has built upward of 500 housing units, mostly in the Bronx Its principal partner is Francisco Lugovina, a developer with about seven years of experience, mostly in housing rehabilitation

JASON D. CARTER & ASSOCIATES

A Manhattan developer, the firm has mostly dealt in office space Its most recent residential development was a building at 22 Central Park South At Battery Park City, it will work with a contractor who has built several thousand housing units in the city

ROCKROSE DEVELOPMENT CORPORATION

One of the city's most active recyclers of lofts and industrial buildings into apartments and cooperatives, Rockrose recently changed direction toward new construction projects It has about 3,000 housing units in its portfolio, with major new construction projects completed or under way

San Francisco Examiner Mon., Aug 25, 1980 ☆E SECTION B

'It's wonderful to see what they've turned it into. Oakland has really outdone itself this time'

Hotel Oakland is resurrected — and praised

By Jon Kawamoto

Florence Newberry would peer out her window from the Ace Locksmith store each day and look across at the Hotel Oakland, at 13th and Harrison streets, and sadly watch the building crumble.

She remembered the hotel's regal history in the 1910's when it was considered the city's grande dame hostelry, where East Bay socialites hobnobbed and where dances in the "Ivory Ball Room" flourished. She recalled when it was turned into a Veterans Hospital after World War II, when it closed in 1963 amid fears it was headed for the wrecker's ball.

But yesterday, Newberry and scores of others delighted in celebrating the hotel's official opening — and resurrection — as a complex of commercial space and low-rent apartments for the elderly.

"It's wonderful," said Newberry, sitting comfortably on a couch in the hotel's cavernous main lobby. "This is exactly what the seniors need — more housing in the downtown area. It's wonderful to see what they've turned it into. Oakland has really outdone itself this time."

Only the east wing of the hotel, with 103 apartments, was opened yesterday. The new residents will begin moving in tomorrow. The entire complex of stores and 315 apartments will be ready by Oct. 15.

The opening was the culmination, in part, of a three year plan by renovation-minded developers and city officials determined to save the 68-year-old structure.

"It's an elegant building and deserves to be restored and fixed," said Dick Neault of the Boston-based minority firm Housing Innovations, Inc., developers of the project. "They should be saved for history's sake. And Oakland looked good because it's on the upswing."

The United California Mortgage Co. of San Francisco, a division of United California Bank, decided to bankroll $15.8 million to refurbish the structure as a downtown revitalization project, according to UCM official Phil Greenlee.

Many details of the hotel in its glory days will be restored in its new role as housing for the elderly and commercial space

Because the hotel was listed in the National Register of Historic Places last year, much of that money went toward restoring it to its 1912 condition. Using the original blueprints, the hotel's exterior and ground floor will be restored. Crystal chandeliers, oak paneling, light fixtures and gold leaf on ceilings will be reconstructed.

The upper eight floors will be used for housing. Neault said the U.S. Department of Housing and Urban Development will provide rent subsidies to the tenants. Rents will be limited to 25 percent of a tenant's income, meaning that a typical four-room unit will only cost about $110 a month.

As the well-dressed crowd of local dignitaries and the curious viewed the furnished apartment models on the fifth floor, they praised the extensive remodeling job.

Embellished by house plants and small furniture pieces, the apartments had the clean, spartan look of any modern unit, down to the fresh off-white paint on the walls.

Residents will inhabit comfortable rooms about 640 square feet in size, with wall-to-wall carpeting, a cozy dining room, bathroom, kitchen, bedroom and a view of downtown Oakland.

The apartments may not resemble the former hotel rooms, and much of the interior has been changed, but for many, yesterday's opening was embraced as a nostalgic journey.

"I just wanted to see what it would be like," said Ann Meyer of Orinda, who came with her husband, Andrew. "I remember working here as a registered nurse when it was a hospital. The government kind of butchered it up a bit. But this is beautiful."

Dorothy Keenan, a diminutive woman in her late 60's, just wanted to see what the hotel offered for her.

"The change is just fantastic," said Keenan, who lives in an apartment complex two blocks away. "I remember it as a hospital. I came here often to visit my son when he was a patient. I've got an application to move in, and, yes, I'm thinking about it."

Newberry glanced at her friend, paused, then added: "I remember when the front yard was filled with junk, with bathtubs and fixtures. I remember the dusty walkways and broken windows. It was an eyesore. Now, I just wish I could qualify to move in. It looks grand again."

The New York Times

REAL ESTATE Sunday, February 22, 1981

2,000-House Plan Will Test Market In Renewal Areas

By RICHARD HIGGINS

Just how much will a family pay to live in a new house in Coney Island? In Prospect Heights? In South Jamaica? In Bushwick? In the South Bronx?

Builders and the city alike will find out once the 2,000 houses that are to be built under a new program announced recently by the Koch administration reach the sales market.

It is the largest construction program ever undertaken under the so-called Section 235 program, which allows a substantial reduction in mortgage-interest costs — to as low as 4 percent in some cases but usually about 7 percent to 10 percent. The use of this program in the city is setting in motion the largest wave of private home construction the city has seen outside Staten Island in perhaps 15 years.

But interviews with some of the nine builders selected to produce the housing at 11 sites suggest that if the market proves strong enough, they will not use the available subsidy. Six additional developers and neighborhoods are to be added to the program soon, according to city officials.

Merit Meyer, for example, who is the designated builder for 150 units in the Coney Island section of Brooklyn, said he would use the Section 235 houses as a "fallback" to test the market.

"If people are looking for more amenities or larger rooms, all well and good," said Mr. Meyer. "We can adapt to what the customer wants."

The builders said they hoped to have models and, in some cases, "marketing pavilions" up by late spring or early summer. The start of construction depends on final action by the Board of Estimate of turning over of the city-owned land to the developers. Completion of all the units is expected by mid-1982.

Housing officials have chosen sites in urban renewal areas where city-owned land has long been available but where there is no chance of new construction without a subsidy that could bring down the cost to a buyer. The developers will finance the construction but the city sold the lots for a nominal fee, $500 in most cases, and has also agreed to help with some site preparations. Home buyers will get a 10-year property tax reduction from the city.

According to recently adopted Department of Housing and Urban Development guidelines, the prices of houses eligible for Section 235 assistance are to cost between $41,500 and $66,000, with downpayments of 4 percent to 10 percent. Some of the larger three-family houses without mortgage subsidies and with rental apartments may be priced as high as $95,000.

Most of the houses will be one-family units in attached rows, two or three stories high and ranging in width from 14 to 20 feet. Most will have a brick exterior. The houses range in size from 1,200 to 1,400 square feet.

"The Section 235 house is your basic Staten Island row house, what would be called a condo in the suburbs," said Abraham Shnay, a Queens-based homebuilder selected to build 151 three- and four-bedroom houses at two South Bronx sites near Crotona Park.

In addition to the inexpensive city land and the inducement of Federal mortgage subsidies for customers, three builders of Bronx projects are to get additional Federal help. Under the Federal Urban Development Action Grants they are slated to get $14,300 toward construction costs of each house. These U.D.A.G.-assisted sites are in addition to the 11 the Mayor announced. The number of units involved is 226.

Mr. Shnay expects to sell the three-bedroom homes for $41,500 and the larger homes for $49,500.

City residents earning from about $17,500 to $26,600 may be eligible for Federal mortgage help. There are no income limits for purchasers of the units without mortgage subsidies other than those imposed by conventional lenders.

There are no prohibitions on reselling the houses at a profit, however city officials say they hope to enact a "recapture" provision to share with the government any increase in the value of the houses with the 235 subsidy. Houses must be owner-occupied.

The plan represents a shift in the city's approach to housing. The city's recent emphasis on building high-rise, subsidized rental units, and on apartment rehabilitation, resulted in a drop in city-assisted new home starts.

The idea is to promote home ownership among residents who've been "shut out" of the housing market, said Timothy Flanagan, director of the city's program for the Department of Housing, Preservation and Development. "By bringing home builders back into the inner city, we're encouraging investment among moderate and low-income New Yorkers and at the same time helping our small house industry."

The prospect of low H.U.D. mortgages has drawn builders, who feel assured of finding buyers, into areas where there is not now a private housing market. "I think we're going to find a pretty big market for houses the average working person can afford," said Irving Rubin, of M.M.R.R. Construction Company of Woodmere, L.I.

M.M.R.R. has been picked to build 386 one-, two- and three-family homes at the Brownsville and East New York sites.

At a community board meeting in East New York, he said, "the people got so charged up over the fear that they might not get first crack at them that there was practically a riot. So they passed a list around for interested home buyers and got 70 names in just 20 minutes."

Several local builders and city housing officials agreed that the inner-city market for moderately priced homes was poorly defined and "untapped" in recent years, and many were convinced it was strong.

"Just ten years ago, the lower- and

middle-income home buyer was still willing to put up with a commute to have a place in the suburbs," said Timothy Flanagan, a deputy commissioner of planning at H.P.D. "But the energy crisis has dried that market up considerably. That sort of buyer is much more interested in a city home."

The mix of publically assisted versus private-market units will be determined by demand.

Some builders have expressed dismay over the time the city has taken to get the project going. The city advertised widely in regional trade and general publications for bids on the projects, then issued R.F.P.'s— requests for proposal— to several builders. Selection was based on a complicated review process involving local community groups and city and Federal administrators. Since the sale of city-held land is required, construction cannot begin until final approval is given by the Board of Estimate and City Planning Commission — an approval regarded as certain by Mayor Koch and other officials.

"I've been anxious to get in the ground on this thing," said Mr. Rubin, who is building homes in Brownsville and East New York. "It's a good idea, but the city needs a little prodding to get all the bureaucratic pieces to fit together."

Joseph Margolis, president of the 200-member New York City Builders Association, said he was afraid that because of increases in construction costs and the interest rate the length of time it has taken to get the program through the Uniform Land Use Review Process (U.L.U.R.P.) could result in making the prices beyond the means of the market for whom the houses were originally intended.

"Local community boards should have a say, but you can't please everybody when you're trying to build small, inexpensive row houses," he said. "The problem isn't building, it's selling to a less affluent market. I'm worried the city's numbers just won't fly. A three-bedroom house with a 20-foot front, by my estimates, is going to end up costing in the neighborhood of $58,000. If people at the Department of Housing, Preservation and Development think that's going to sell in Bedford-Stuyvesant, somebody there is smoking something stronger than I do."

Nonetheless, Mr. Margolis, a former city development official, said he was excited about the small homes program. The builders association set up a nonprofit corporation to be a co-sponsor of the Fulton Park, Brooklyn, and South Jamaica, Queens, home sites.

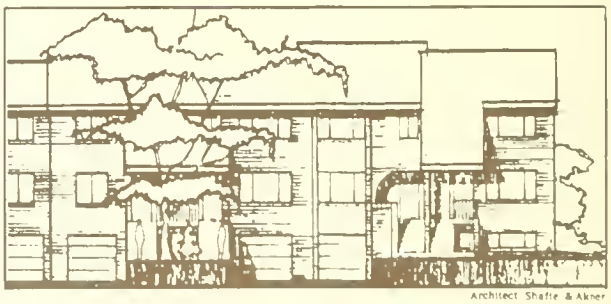
"It means millions of dollars of work for our small builders and subcontractors, and we get the satisfaction of building private homes for a segment of the market we haven't been serving," said Mr. Margolis. " No one has really been building homes for middle-class working people in New York City, outside of Staten Island, for years."

Architect Beyer Blinder Belle

In the South Bronx two-story and three-story units such as those seen above are expected to be priced from about $41,500 to $49,500.

Architect Jerome L. Grusbain

In Jamaica Village in Queens there will be 180 new dwellings in this two-story semi-attached town-house style. Target date: mid 1982.



Architect Shafie & Akner

In Bushwick 37 single family row houses such as these will be built. It was the city offer to sell lots for $500 that spurred the project.

For More Information

Here is a list of the neighborhood sites and the developers selected to begin the program. Six other sites will be announced soon.

Brooklyn:

Coney Island West (188 houses) and Prospect Heights (55 houses), The Wolowitz Organization of Dix Mills, N.Y., (516) 349-1091

Marcus Garvey houses in Brownsville (275 houses) and Essex Linwood houses in East New York (111 houses). M.M.R.R. Construction Co. of North Woodmere, L.I. (516) 431-5103.

Coney Island East (150 houses), M.T.S. Associates of Manhattan, 874-0324

Fulton Park in Bedford-Stuyvesant (71 houses), Urban Housing Associates of Staten Island, Fulton-Herkimer Housing Development Corp, 948-2300.

Columbia and President streets, (173 houses) Monadnock Construction Co., Kings Restoration Corporation of Brooklyn, 875-8160

The Suydam Street Homeownership site in Bushwick, (37 houses) Oljor Realty Corp. of Brooklyn, 626-6637.

Bronx:

Tiffany and Fox streets (24 houses), Property Resources Inc. of the Bronx in conjunction with the South East Bronx Community Organization (S.E.B.C.O.).

Abraham Shnay Construction Company, based in Queens, was selected to build three- and four-bedroom units at two South Bronx sites near Crotona Park. One site for 62 houses is at Quarry Road and East 182d Street; the other site for 89 houses, known as Crotona-Mapes, is at Clinton and Prospect avenues

Another 75 houses are to be built in Morrisania between East 166th and East 169th Streets by I.H.C. Construction, a Nassau County company.

All Bronx housing queries should be directed to the South Bronx Development Office, 993-7850.

Queens:

Jamaica Village in South Jamaica (180 houses), Metropolitan Homestead Co. of Staten Island, 948-2300.

Manhattan:

St. Nicholas Park (108 houses) (136th to 138th streets off Frederick Douglas Boulevard), Housing Innovations of Boston with St. Charles Borremeo Church as sponsor. Calls should be directed to Monsignor Emerson Moore at 281-2100.

Redevelopment In Times Square Unlikely Till '84

Construction Could Start by Then, Agency Says

By FRANK J. PRIAL

Construction work on the $1 billion redevelopment of Times Square and the West 42d Street area is unlikely to begin before 1984, the Urban Development Corporation, which will manage the project, said yesterday.

The plan calls for the construction of four new office towers with about 4 million square feet of space, a 2.4 million-square foot wholesale trade mart and a 500-room motel.

In addition, nine Broadway theaters, most of them used as movie houses, will be renovated. Six will become legitimate theaters, one will continue as a legitimate theater and two will be turned into restaurants or retail space.

"The doubters about Times Square were wrong," said George G. Dempster, chairman of the Urban Development corporation. "They said the city and the U.D.C. would not receive serious bids for this project, but we did. They said we could not put together a serious financial package, but today we have."

The selection of developers is the first step in a program that is expected to take 10 years to complete.

Still to come are a preliminary environmental-impact statement, as required by the state and Federal governments, public hearings on the environmental effects of the redevelopment project and a final environmental-impact statement.

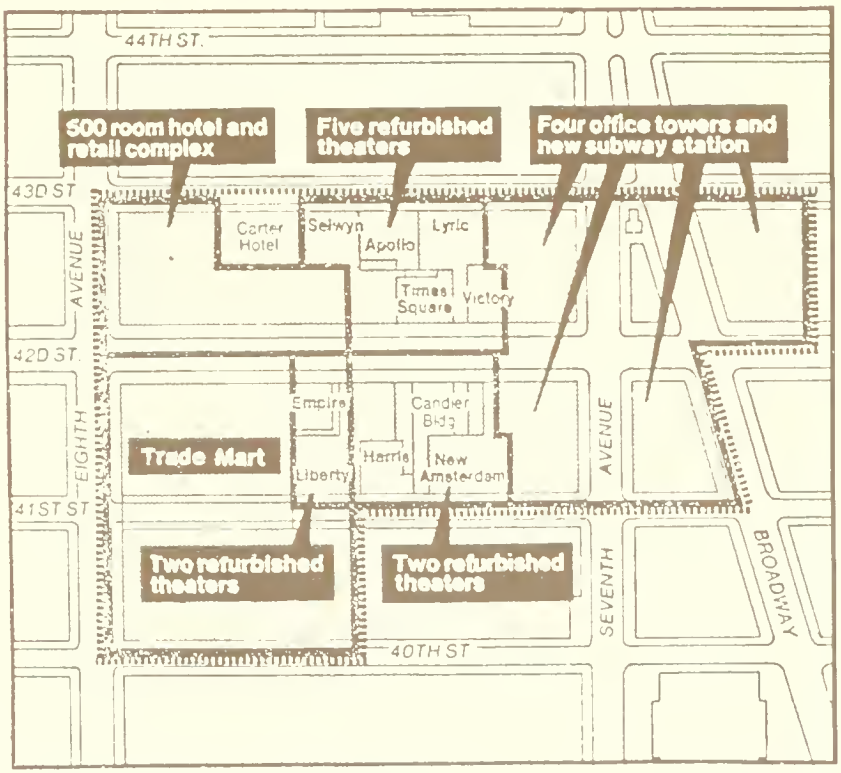
Leases still must be negotiated with the developers, and land-acquisition procedures must be undertaken. In addition, condemnation must be eventually be sought for parcels that cannot be acquired by purchase. Litigation over such condemnation proceedings is expected to take time.

'A Conditional Selection'

"In any land-taking," said Robert Rafsky, a U.D.C. spokesman,

The New York Times

A model of the project, looking north from 40th Street between Eighth Avenue, left, and the Avenue of the Americas.



Plan for redeveloping 42nd Street area.

The New York Times

"you've got to factor in litigation. Someone is always going to try to get higher value by taking you to court."

"What we have now is a conditional selection of developers," he added, "but it has been an unusually detailed conditional selection. So a lot of work has already been done. Even so, if there are problems, we can dismiss a developer and go back to a second choice."

The developers chosen from about 30 that submitted bids were the Park Tower Realty Corporation, owned by George Klein, a member of the family that founded the Barton's Candy Corporation and a major builder of New York City office towers, which will put up the four office buildings; New York Mart, a California group, which will build the trade mart; Housing Innovations/Planning Innovations, a minority-run Boston company, which will construct the hotel, and the Nederlander Organization, which will refurbish the New Amsterdam and Harris theaters, now movie houses, as legitimate theaters.

Two other theaters on the south side of West 42nd Street—the Empire and the Liberty—will be renovated as part of the trade mart project.

New Operator for Theaters

Five theaters on the north side of the street, the Selwyn, the Lyric, the Times Square, the Victory and the Apollo, which are now part of the Brandt Organization, will be turned over to an operator not yet designated.

In recent yars, the Apollo has been renovated, with its entrance moved to 43rd Street, to become a legitimate theater know as the New Apollo.

Herbert J. Sturz, chairman of the City Planning Commission, said that most of the environmental-impact statement was completed.

"We began work on it in 1980," he said, "and it helped inform the overall plan as we developed it."

Mr. Sturz predicted that the environmental hearings could be held in June and that a final impact statement could be presented to the city's Board of Estimate in November.

"Simultaneously," he added, "we will be working to complete the lease negotiations. Also, the design work will be going on while these other jobs are being done. After all, the clock is now running for everyone involved—the city, the U.D.C. and the developers, who will be putting up $100,000 a month in lieu of taxes toward the city's expenses on the project."

By February 1983, Mr. Sturz estimated, a condemnation map of the 13-acre site will be ready, even though city and Urban Development Corporation officials hope that some acquisition of the site will have been made.

Most of 1983, he said, wil be occupied with acquiring the sites within the project area.

"We will spend 1983 getting in shape to start work in 1984," Mr. Sturz said.

THE WALL STREET JOURNAL.

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Four Developers Picked To Rebuild New York's Times Square Section

By a WALL STREET JOURNAL *Staff Reporter*

NEW YORK—The city and state governments selected four developers to rebuild a two-block area around Times Square that currently is blighted by pornography shops and drug dealers.

The officials chose Park Tower Realty Corp., whose president is developer George Klein, to build four office towers with 3.9 million square feet around the former Times Tower building at 42nd Street and Broadway.

They also selected a partnership led by the Morse family of Los Angeles to build a wholesale mart, and Housing Innovations/Planning Innovations, a minority owned business, to build a 500-room hotel, both on Eighth Avenue. The Nederlander Organization will rebuild two movie houses into legitimate theaters.

Philip Aarons, president of the city's Public Development Corp., said construction should start in 1984 and be completed late in the decade.

Mr. Klein, whose father founded Barton's Candy Corp., has built two buildings in Brooklyn, two in midtown Manhattan, and has another about to start construction, in lower Manhattan. The last three have won praise for their designs by noted architects I.M. Pei, Edward Larrabee Barnes, and the team of Philip Johnson and John Burgee.

Several other developers submitted bids for the office project but dropped out, including the two Canadian giants Cadillac-Fairview Urban Northeast and Olympia & York Developments Ltd. The state will condemn the development sites and the city will grant 15-year property tax abatements.

Vol. 1 No. 9 Thursday, June 4, 1981

the INQUIRER

Serving Hartsdale, Fairview, Orchard Hill and Central 7 residents

Future of school site is outlined

By BONNIE GEORGE

The Washington Avenue School building, vacant since 1976, will probably be there but it won't be the same. It will be the hub of a 40-unit condominium if plans for the site go through.

Denis Blackett, a Boston developer, representing Housing Innovations, Inc., and Grammar School, Inc., is about to purchase the property from the Central 7 School Board.

At a meeting at the Highview School on Tuesday night attended by Central 7 real estate committee members, representatives of Blackett's interests, and area residents, Blackett presented plans for the condominium complex.

While the area residents were receptive to Blackett's plans, they voiced concern over a driveway that would come out on Hartsdale Avenue. Blackett listened to their suggestions, emphasizing that all plans were still tentative and could be rearranged.

Blackett, who holds a master of civil engineering (structural) degree from MIT, has been in business for 16 years, building new structures and renovating old ones, putting abandoned buildings back on the tax roles. If he is able to turn the Washington Avenue property into 40 condominiums, $120,000 in taxes would come to Greenburgh each year, with each unit contributing approximately $3,000. Blackett has turned the Hotel Oakland in Los Angeles into a 315 unit complex for the elderly and converted several abandoned Boston schools into condominiums.

Referring to her co-committee members Janet Lefkowitz, Barry Kessler and Jean Green, Timmy Weinberg said, "We are not in the real estate business. We just live here the way you do."

Three of the committee members visited projects completed by Blackett in Boston.

"We were most impressed. The condominiums we saw combined luxury with the charm of the old buildings they are in. I think Mr. Blackett's concept for the Washington Avenue property can do nothing but enhance Greenburgh," Mrs. Lefkowitz said.

Plans drawn by L. E. Tuckett and Thompson, architects with New York City headquarters, were shown by Maxine Gibson, project architect, and Peter Stand, project captain.

The Washington Avenue school building as proposed will contain four condominiums, an exercise room, a sauna and a club room. The other 36 one- and two-bedrooms units, some with studies, will be constructed as attached townhouses with vertical wood siding. The one bedroom units will be 1,400 square feet and the two bedroom units 1,600 square feet.

Ruth Ricker, project director for Housing Innovations, spoke of other amenities planned. She said each unit will have central air-conditioning, energy-efficient plumbing, the latest in kitchen appliances including a microwave oven, triple glazed windows and a fireplace. Where possible, she said, units may have exposed brick. A greenhouse area is planned for the triplex units. In addition to a garage under each unit there is to be visitor parking. A swimming pool is to be constructed adjacent to the school building on the Washington Avenue side.

Blackett must now ask the town of Greenburgh to change the zoning of the property. He said he is hoping to have it converted from a partial to an all multi-family site.

Negotiations are underway between the school board and the town over a small piece of the just under six-acre property. On the sale of the property the piece of land must revert back to the town. The school district wants to purchase the land so that it can be sold to Blackett.

"It is not land that can be built on because it is very rocky," Ms. Weinberg said. "Its value is in that it can enhance the condominium site."

If zoning and the prospectus are approved, the next step will be the approval of the sale by residents of the school district. A referendum is set for Aug. 19.

Units will range in price from $130,000 to $150,000, according to the developer. Construction, which may begin as early as this fall is expected to take eight to 10 months. No staging is involved. A fall 1982 occupancy date is possible, Blackett said.

Bob Gold, president of the Windsor Park Civic Association, spoke positively of Blackett's proposed plans.

"We have been offered everything from HUD housing to light commercial use of the property," Gold said. "No matter what you do there is going to be more traffic. The choice is between 57 Chevvies or new Cadillacs."

According to the terms of the contract, the sale could bring the district as much as $500,000 if Blackett is able to construct all 40 units.

BALTIMORE AMERICAN, Monday, May 3, 1982

Bolton Hill Site Awarded to Minority-Owned Firm

By Edward Gunts
News American Staff

Rights to one of the last major development sites in Bolton Hill have been awarded to a local minority-owned firm that earlier this year submitted a $5.8 million plan to build 61 two-story rowhouses, Mayor William Donald Schaefer has announced.

A 5.7 acre parcel owned by the city at Mount Royal and North Avenues will be turned over to Housing Innovations Inc. of Baltimore, which plans to build 17 three-bedroom and 44 two-bedroom houses selling for prices ranging from $90,000 to $110,000.

Housing Innovations, which is working to complete the Poppleton Place development project in west Baltimore, was one of four firms that submitted plans for the prime Bolton Hill site, which is less than 10 blocks from the new symphony hall. Nelson Salabes with be the architect and Frank Favazza and Sons will be the general contractor.

According to its proposal, Housing Innovations will begin construction in early 1983 on new houses facing McMechen Street, followed by houses that face North Avenue. The project leaves the old Friends School building on Park Avenue as the largest undeveloped site in Bolton Hill.

Schaefer also announced that the city is turning over a former firehouse at 760 W. Baltimore St. to local developers who plan to convert it into a chili parlor with seven one-bedroom apartments above.

Architect Paul Marks, president of the Baltimore chapter of the American Institute of Architects, and general contractor Warren Smith were selected to recycle the vacant firehouse over four other groups that submitted proposals for the property, which is near the new Harbor City Boulevard.

The apartments will rent for $225 to $250 a month. Poppleton residents have been promised that they will receive priority for both jobs and apartments in the project, which Marks said will cost about $200,000 to complete.

In announcing the awards, Schaefer said city officials will work to find other locations for developers who were not selected. He expressed pleasure that all of the Bolton Hill proposals called for home-ownernship, and he said that demonstrated the developers' confidence of future housing sales in that part of the city.

February 1981
Vol. XXI, No. 2

Preservation News

The National Trust for Historic Preservation in the United States

Spring Street bounces back

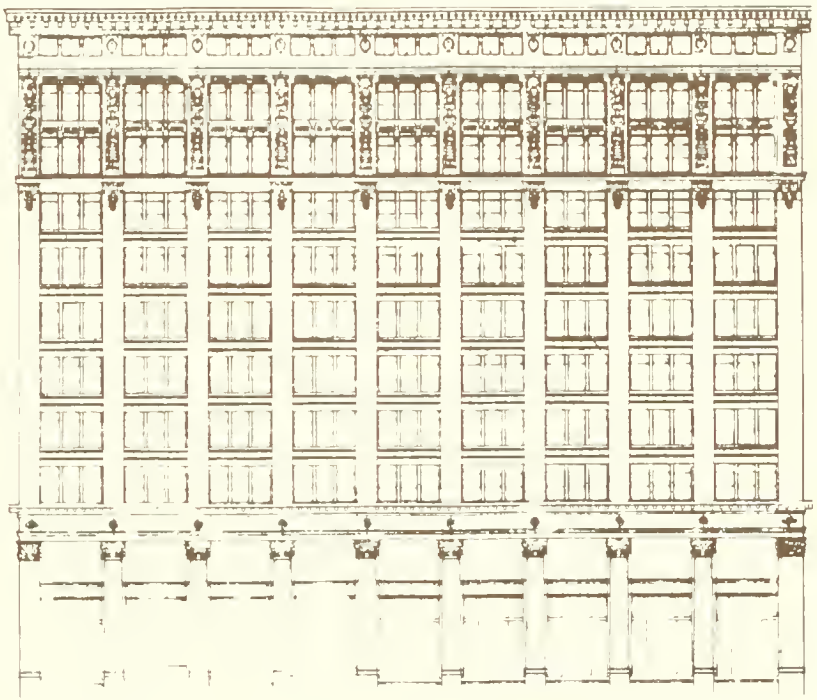
It was once the Wall Street of Los Angeles. But today Spring Street consists largely of abandoned or underused neoclassical and Italianate office buildings constructed in the first quarter of this century.

Now a plan to convert the 11-story Van Nuys Building (1911, Morgan, Walls and Morgan) into 299 federally subsidized apartments for the elderly and the blind may be heralding a new era for the area.

Minority developer

Conversion of the National Register building, which is faced in terra cotta and granite, will be finished by 1983. The project is co-sponsored by Housing Innovations, Inc., a Boston-based minority-owned housing developer, and the city, which is issuing $20 million in bonds to help finance the $24 million project.

Under the U.S. Department of Housing and Urban Development's Section 8 program, tenants will pay only 25 percent of the market rent with the federal government picking up the rest.



Archiplan

The Van Nuys Building in downtown Los Angeles, soon to be housing.

Tax incentives

The developers are also taking advantage of federal preservation tax incentives for renovating historic commercial buildings.

"Seventy-five percent of the reason work like this is done is because of these incentives," said Denis Blackett of Housing Innovations, which has completed similar conversions to housing of two old schools in Boston and the Hotel Oakland in Oakland, Calif.

Restoration architect Ellis Barker, AIA, of Edward Barker and Associates told PRESERVATION NEWS that the entire facade and lobby would be saved, but otherwise the interior would have to be gutted. In addition, a brace will be added to the interior courtyard walls as insurance against earthquakes.

In 1977, the National Trust helped finance a study of 50 empty or near-empty buildings in the Spring Street area that could be adapted for housing for the elderly. The Van Nuys Building was one of the 50. "There's a lot of potential here," Barker said. "This is supposed to kick the whole thing off."

The New York Times

City Names Main Builders In Times Sq. Redevelopment

By FRANK J. PRIAL

Four, and possibly five, major developers have been chosen by New York City and the State Urban Development Corporation as the primary builders for the Times Square redevelopment plan, according to a senior official in the Koch administration.

The plan, which eventually will cost an estimated $1-billion, is a sweeping scheme designed to revitalize the area. It involves the construction of skyscrapers, the rehabilitation of a row of legitimate theaters along West 42d Street, a new merchandise mart for the garment industry and a luxury hotel.

Karen Gerard, deputy mayor for economic planning and development, termed the plan: "The largest redevelopment plan in the city's history."

The principal developers are Park Realty, owned by George Klein, a major builder of commercial highrise towers in Manhattan and a member of the family that founded Barton's Candy Corporation; the Morse family of California, Housing Innovations/Planning Innovations, a minority-controlled development and construction organization based in Boston, the Nederlander Corporation and, possibly, the Brandt Organization, the last two are owners of seven theaters in the project area.

Four Skyscrapers

Park Tower, which received the largest contract, will build four skyscrapers — each with one million square feet of space — at Seventh Avenue and 42d Street and Broadway and 42d Street. Acquistion cost of the land for the towers is estimated at $80.5-million, most of it assembled by Eastdil Realty, a concern of real estate investment bankers. The company will also undertake the rehabilitation of the crumbling Times Square subway station at an estimated cost of $21.6-million.

Housing Innovations/Planning Innovations, the minority-controlled developer, will construct a 500-room luxury hotel and retail complex on Eighth Avenue between 42d Street and 43d Street.

Acquisition and development costs costs for the hotel property are estimated at $73-million. Housing Innovations/Planning Innovations, according to a city spokesman, is a successful residential developer that recently was awarded a portion of the Battery Park City development project.

Merchandise Mart Planned

A 2.5-million-square-foot merchandise mart will be built by the Morse family between 40th Street and 42d Street across Eighth Avenue from the Port Authority Bus Terminal. The Morses, represented by David Morse and Richard Reinis, now operate a similar wholesale mart in Los Angeles.

The Brandt Organization owns five theaters in the project area, the Selwyn, Apollo, Lyric, Times Square and Victory. The cost of renovating them and switching them from rundown film theaters to legitimate theaters is estimated at $6.7-million.

Early this morning it was still not certain if the Brandt group would participate in the project. If Brandt is included, the plan calls for Park Tower to contribute $4.4-million to acquire the Times Square and Victory Theaters.

The Nederlander Corporation owns the New Amsterdam and Harris Theaters, for which the estimated renovation costs are $5.4-million. Park Tower will pay $3-million to acquire the Harris.

26 Proposals Received

Developers from five states and Canada filed 30 proposals last year — far more than the city expected — for the renovation of the Times Square area.

All the construction projects will be directed by the city's Public Development Corporation and the Urban Development Corporation. The latter has recently achieved dramatic success in starting construction of Battery Park City, a luxury residential project, and the New York City Convention Center.

Although the city and state have accepted the initial proposals from these developers, and the board of directors of the Urban Development Corporation was expected to approve them this morning, each proposal must undergo a rigorous review by the affected community boards, the City Planning Commission and the Board of Estimate. This process will take at least six months.

Other difficulties, according to Herbert J. Sturz, the chairman of the City Planning Commission, include the possibility of prolonged civil suits by the owners of the numerous pornographic book stores in the area.

Once all the projects and the developers have been approved by both the city and the Urban Development Corporation, the project will be turned over to the U.D.C. for completion. The Urban Development Corporation was brought into the project by Mayor Koch after he had rejected an earlier, less ambitious plan for rehabilitating 42d Street and the Times Square area.

Mayor Koch was scheduled to unveil scale models of the redevelopment project and formally announce the names of the developers at City Hall today.

IN THE NEWS
BLACK ENTERPRISE
FOR BLACK MEN AND WOMEN WHO WANT TO GET AHEAD
JULY 1982 VOL. 12, NO. 12

Hotel For Times Square

Two black-owned real estate development firms—Housing Innovations, Inc. of Boston and Planning Innovations, Inc. of New York—have been selected by the Urban Development Corporation to build a large hotel as part of the rehabilitation of the Times Square District in New York City. The projected cost of the joint venture is put at $80 million.

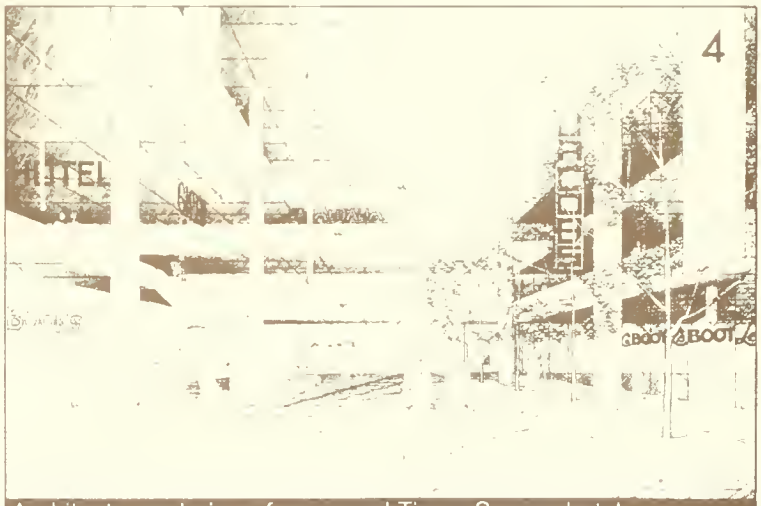
Denis A. Blackett, chief executive officer of Housing Innovations, says most of the money for development of the 500 to 600 room hotel will come from debt and equity financing.

Housing Innovations has hired a black architect, Donald Stull, of Stull Associates of Boston, to design the hotel. Blackett said he is committed to providing opportunities for minority-owned firms as subcontractors on the project.

Housing Innovations is a new kid on the block in New York City development. Last winter, in another joint venture with Planning Innovations, the company began a $45 million residential development in Battery Park City—its first project in the city.

The firm, is no neophyte when it comes to urban redevelopment in general, however. For example, in Oakland, Calif., the firm recently completed a $20 million rehabilitation of the Hotel Oakland to be used for housing of the elderly. Currently, Housing Innovations is involved in 150 million dollars' worth of development projects in New Orleans, Baltimore, and Boston, along with plans for another project in Richmond, Virginia.

—Laura Coverson



Architects rendering of proposed Times Square hotel

HII CORPORATION

Consolidated Financial Statements
Years Ended December 31, 1981
and December 31, 1980

HII CORPORATION

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Report on Financial Statements

Financial Statements

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Report on Supporting Schedule

Supporting Schedule

	Schedule
Consolidated schedule of project fees	I

HENRY J. BORNHOFFT COMPANY
Certified Public Accountants

82 DEVONSHIRE STREET
BOSTON, MASSACHUSETTS 02109
617-725-2440

Board of Directors
HII Corporation
50 Franklin Street
Boston, Massachusetts 02110

We have examined the consolidated balance sheet of HII Corporation and subsidiaries as of December 31, 1981 and December 31, 1980 and the related consolidated statements of income, retained earnings and changes in financial position for the years then ended. Our examination was made in accordance with generally accepted auditing standards and, accordingly, included such tests of the accounting records and such other auditing procedures as we considered necessary in the circumstances.

In our opinion, the aforementioned financial statements present fairly the financial position of HII Corporation and subsidiaries at December 31, 1981 and December 31, 1980 and the results of their operations and the changes in their financial position for the years then ended, in conformity with generally accepted accounting principles applied on a consistent basis.

Henry J. Bornhofft Company

Boston, Massachusetts
May 10, 1982

HII CORPORATION

Consolidated Balance Sheet at December 31, 1981 and December 31, 1980

ASSETS

	1981	1980
CURRENT ASSETS:		
Cash	$ 30,043	$ 7,626
Notes receivable--project fees	2,834,023	1,612,391
Accounts receivable--closed projects	223,680	-
Accounts receivable--other	48,501	18,735
Due from affiliates	955,703	261,929
Prepaid development costs	486,384	616,627
Prepaid expenses	3,679	1,936
Total current assets	4,582,013	2,519,244
PROPERTY AND EQUIPMENT:		
Cost	958,353	714,258
Less accumulated depreciation	125,929	134,660
Net property and equipment	832,424	579,598
NOTES RECEIVABLE--LONG-TERM:		
Project fees	2,970,697	3,199,046
Residual receipts	685,954	665,954
Other	-	35,861
Total long-term notes receivable	3,656,651	3,900,861
OTHER ASSETS:		
Cash escrows	19,416	427,397
Investments in limited partnerships	62,563	62,553
Due from affiliates	103,602	88,984
Miscellaneous	19,942	13,448
Total other assets	205,523	592,382
	$9,276,611	$7,592,085

LIABILITIES AND STOCKHOLDERS' EQUITY

	1981	1980
CURRENT LIABILITIES:		
Current portion of long-term debt	$ 977,400	$1,217,714
Notes payable	847,371	525,013
Accounts payable	262,482	239,916
Due to affiliates	136,875	103,522
Accrued expenses	210,748	211,868
Accrued taxes	103,227	31,253
Accrued income taxes	92,052	66,493
Total current liabilities	2,630,155	2,395,779
LONG-TERM DEBT, less current portion	1,077,189	1,071,120
DEFERRED INCOME TAXES	428,000	574,000
DEFERRED INCOME	3,230,434	1,624,549
	7,365,778	5,665,448
STOCKHOLDERS' EQUITY:		
Common stock:		
1,000 shares authorized, $.01 par value issued and outstanding	10	10
Preferred stock:		
Class A--3,250 shares authorized and issued, $100 par value; no shares outstanding	325,000	325,000
Class C--6,000 shares authorized, 5892 shares issued, $100 par value; no shares outstanding	589,200	589,200
Class D--9,000 shares authorized, 8,892 shares issued, $100 par value; 8,892 shares outstanding	889,200	889,200
Retained earnings	1,021,623	1,037,427
	2,825,033	2,840,837
Less treasury stock, at cost, preferred stock--Class A and Class C	914,200	914,200
	1,910,833	1,926,637
	$9,276,611	$7,592,085

The accompanying notes are an integral part of these financial statements.

HII CORPORATION

Consolidated Statement of Income, Years Ended December 31, 1981 and December 31, 1980

	1981	1980
REVENUE:		
Project fees	$ 838,981	$2,258,581
Interest income--project fee escrow	260,338	204,420
Interest income--amortized discount	199,561	493,576
Interest income--other	59,442	53,569
Parking income	22,631	23,120
Miscellaneous income	18,563	18,072
	1,399,516	3,051,338
OPERATING EXPENSES:		
Advertising	10,125	3,167
Depreciation and amortization	2,448	9,012
Equipment rental	19,290	17,718
Interest expense	271,597	274,662
Legal and audit	87,333	81,284
Loss on rentals	40,389	49,240
Other general and administrative expenses	89,146	64,756
Project development expense	205,899	231,940
Rent	70,712	59,567
Salaries, wages and related expenditures	682,479	687,876
Telephone	46,012	41,947
Travel and entertainment	183,806	148,272
	1,709,236	1,669,441
NET INCOME (LOSS) BEFORE FEDERAL AND STATE INCOME TAXES	(309,720)	1,381,897
PROVISION FOR INCOME TAXES:		
Deferred--federal	(38,000)	155,046
Deferred--state	(108,000)	185,313
Current--state	15,604	59,163
	(130,396)	399,522
NET INCOME (LOSS)	$ (179,324)	$ 982,375

The accompanying notes are an integral part of these financial statements.

HII CORPORATION

Consolidated Statement of Retained Earnings, Years Ended December 31, 1981 and December 31, 1980

	1981	1980
BALANCE, JANUARY 1	$1,037,427	$ 55,052
ADDITIONS AND REDUCTIONS:		
Net income (loss)	(179,324)	982,375
Adjustment of prior period project costs	163,520	-
BALANCE, DECEMBER 31	$1,021,623	$1,037,427

The accompanying notes are an integral part of these financial statements.

HII CORPORATION

Consolidated Statement of Changes in Financial Position, Years Ended December 31, 1981 and December 31, 1980

	1981	1980
SOURCES OF WORKING CAPITAL:		
Operations:		
Net income	$ -	$ 982,375
Adjustment for items not requiring outlay of working capital in the current period:		
Depreciation and amortization	-	15,719
Deferred income taxes	-	340,359
Sources from operations	-	1,338,453
Decrease in long-term note receivable	244,210	470,218
Decrease in cash escrows	407,981	93,182
Decrease in due from affiliates	-	99,185
Increase in deferred project fees	1,605,885	-
Increase in long-term debt	6,069	-
Increase in retained earnings--adjustment of prior period project costs	163,520	-
Decrease in property--sale of real estate	20,284	-
	2,447,949	2,001,038
USES OF WORKING CAPITAL:		
Operations:		
Net loss	179,324	-
Adjustment for items not requiring outlay of working capital in the current period:		
Depreciation and amortization	(6,400)	-
Deferred income taxes	146,000	-
Uses by operations	318,924	-
Decrease in miscellaneous other assets	22,083	4,796
Purchase of property and equipment	278,549	98,781
Decrease in long-term debt	-	581,307
Decrease in deferred project fees	-	711,086
	619,556	1,395,970
INCREASE IN WORKING CAPITAL	1,828,393	605,068
WORKING CAPITAL, BEGINNING OF YEAR	123,465	(481,603)
WORKING CAPITAL, END OF YEAR	$1,951,858	$ 123,465

	1981	1980
CHANGES IN COMPONENTS OF WORKING CAPITAL:		
Increase (decrease) in current assets:		
Cash	$ 22,417	$ (1,451)
Notes receivable--project fees	1,221,632	807,614
Accounts receivable--closed projects	223,680	(172,102)
Accounts receivable--other	29,766	12,960
Due from affiliates	693,774	70,101
Prepaid development costs	(130,243)	513,415
Prepaid expenses	1,743	(4,177)
	2,062,769	1,226,360
Increase (decrease) in current liabilities:		
Notes payable and current portion of long-term debt	82,044	449,976
Accounts payable	22,566	56,358
Due to affiliates	33,353	42,837
Accrued expenses	(1,120)	57,696
Accrued taxes	71,974	(28,905)
Accrued income taxes	25,559	43,330
	234,376	621,292
	$1,828,393	$ 605,068

The accompanying notes are an integral part of these financial statements.

HII CORPORATION

Notes to Consolidated Financial Statements at December 31, 1981 and December 31, 1980

NOTE 1--SIGNIFICANT ACCOUNTING POLICIES

Depreciation and Amortization

Property, equipment and improvements are carried at cost. Depreciation is determined using the declining balance method for buildings and straight-line method for equipment and improvements over estimated useful lives of 15 to 33 years and 2 to 10 years, respectively. Expenditures for maintenance, repairs and improvements, which do not significantly extend the useful lives of assets, are charged to earnings as incurred.

The company has incurred costs in the organization of subsidiaries which are being amortized on a straight-line basis over five years.

Principles of Consolidation

The consolidated financial statements include the accounts of the company and its subsidiaries, all of which are wholly-owned. All significant intercompany accounts and transactions have been eliminated in consolidation.

Leases

The company is obligated at December 31, 1981 under long-term operating leases for office facilities, with minimum aggregate rentals totaling $356,580 as follows: $67,920 per year for 1981-1984 and $76,410 for 1985 and 1986. Leases for the office facilities contain provisions for escalations in operating expense.

Income Taxes

Provision has been made for deferred income taxes on all significant timing differences which represent the tax effects of transactions reported for tax purposes in periods different than for book purposes. Investment tax credits are accounted for on the flow-through method as a reduction of the provision for income taxes in the year in which the related property is placed in service.

The deferred income tax provision at December 31, 1981 and 1980 consists principally of 1) method of recognition of project fees for tax purposes and 2) carrying of investments in limited partnerships at cost for financial reporting purposes and at equity (recognizing flow-through losses) for tax purposes.

HII CORPORATION

Notes to Consolidated Financial Statements at December 31, 1981 and December 31, 1980

At December 31, 1981 and December 31, 1980, the company had, for tax purposes, loss carryforwards of $986,000 and $1,100,000 available to reduce income taxes in future periods. The provision for deferred income taxes at December 31, 1981 and 1980 is as follows:

	1981	1980
Federal income tax	$198,000	$306,000
State income taxes	230,000	268,000
	$428,000	$574,000

Project Costs

The company, in the preliminary development of projects, has incurred costs which have been capitalized pending the final commitment or disposition of the project. In December 1979, the Van Nuys project had its limited partner (equity) closing. In November 1981 and January 1982, the Fieldstone and Poppleton Place projects, respectively, had their equity closings. At December 31, 1981 the following development costs are reimbursable to the company:

Van Nuys	$ 13,122
Fieldstone	19,545
Poppleton Place	191,013
	$223,680

At December 31, 1981, project development costs of $486,384 consists principally of $284,744 - Hartford, $48,368 - New York and $112,669 - Boston.

At December 31, 1980, project development costs of $616,627 consists principally of $208,390 - Hartford, $164,487 - Baltimore and $106,106 - Boston projects.

Project Fees and Notes Receivable Project Fees

The company earned project fees during 1980 and 1979 for various administrative, construction supervision, repurchase guarantees and other services provided to project partnerships. Fees are earned based upon performance of services to the project partnerships as detailed in the various limited partnership agreements. Collection of project fees is predicated upon specific dates and/or performance as also detailed in the various limited partnership agreements.

HII CORPORATION

Notes to Consolidated Financial Statements at December 31, 1981 and December 31, 1980

Notes receivable - project fees represent fees to be collected in future periods based upon the various limited partnership agreements. At December 31, 1981 and December 31, 1980, notes are collectible in the following periods:

	1981	1980
1981	$ -	$1,805,904
1982	2,838,036	2,098,036
1983	1,706,188	960,108
1984	422,586	30,476
1985	439,429	25,259
1986	9,354	9,354
Beyond	-	111,298
	$5,415,593	$5,040,435

Although notes are collectible at their face value, certain notes owed to the company are non-interest bearing and, accordingly, under Accounting Principles Board Opinion No. 21, have been discounted to reflect imputed interest. For projects closed, an imputed interest rate of 12% is used. Discount of the face value of non-interest bearing notes is amortized over the note period. Unamortized discount of $35,485 and $228,998 at December 31, 1981 and 1980, respectively, are presented for balance sheet purposes as a reduction in the face value of the notes and as interest income (discount amortization for income statement purposes).

Notes Receivable - Residual Receipts

The company, for closed projects, has provided funds to the projects in accordance with the respective limited partnership agreements. Such funds are evidenced by residual receipt notes, which are collectible at dissolution of the applicable project partnership or disposition or refinancing of the project partnership's assets, as detailed in the various limited partnership agreements. At December 31, 1981 and 1980, residual receipt notes of $685,954 and $665,954 are due from:

	1981	1980
Hotel Oakland Associates	$384,790	$384,790
Schoolhouse '77 Associates	120,164	120,164
Lawrenceville Associates	181,000	161,000
	$685,954	$665,954

HII CORPORATION

Notes to Consolidated Financial Statements at
December 31, 1981 and December 31, 1980

NOTE 2--AFFILIATED PARTIES

The company is affiliated with Tenant Services, Inc., a real estate management company, through mutual stockholders. In addition, the company is affiliated with certain limited partnerships through general partnership interests. All transactions with affiliated parties are on an arms-length basis.

NOTE 3--NOTES PAYABLE

At December 31, 1981 and 1980, the company had short-term borrowings of $847,371 and $525,013 outstanding, respectively. Details of borrowing arrangements are as follows:

Lender	Rate	1981	1980
Bank of New England	17.75%	$601,077	$500,428
State Street Bank	17.50	240,000	-
Other	15.25	6,294	24,585
		$847,371	$525,013

Borrowings at December 31, 1981 and 1980 of $841,077 and $500,428, respectively, are secured by notes receivable project fees.

NOTE 4--LONG-TERM DEBT

At December 31, 1981 and 1980, the company had long-term debt outstanding of $2,054,589 and $2,288,834, respectively. A summary of long-term debt is as follows:

	1981	1980
Mortgage notes - secured by real estate:		
Massachusetts Housing Finance Agency:		
5.915% due April 2012	$ 58,003	$ 58,531
6.53% due April 2014	61,063	61,340
Homeowner's Federal Savings:		
6.75% due May 1993	-	13,217
Boston Federal Savings:		
7.75% due May 1993	-	10,763
	119,066	143,851

HII CORPORATION

Notes to Consolidated Financial Statements at December 31, 1981 and December 31, 1980

	1981	1980
Promissory notes - secured by notes receivable - project fees and real estate:		
United California Bank:		
12% due March 1981	-	360,000
Cooperative Assistance Fund:		
8% due June 1981 through December 1984	218,750	250,000
Robert Dollar Company:		
8.25% due January 1981, 1982 and 1983	338,961	598,451
Mass. Venture Capital Corp.:		
23.5% due January 1981	-	25,855
15% due December 1981, 1982 and 1983	150,000	150,000
20.125% due December 1982, 1983 and 1984	49,500	-
Midtown Co-developers:		
Non-interest bearing due January 1981 and 1982	186,368	336,000
Property Capital Advisers:		
12% due January 1981	-	100,000
Milton and Marie Handman:		
10% due 1982, 1983, 1984, 1985 and 1986	195,250	-
Boston Financial Technology Group, Inc.:		
20% due June 1982	142,000	-
20% due June 1983	170,000	-
20% due June 1982	75,000	-
	1,525,829	1,820,306
Promissory notes - general:		
Non-interest bearing	13,334	13,334
5% due June 1981	-	10,250
Non-interest bearing - other	196,360	201,093
Capital Housing Corp.:		
10% due 1981	200,000	100,000
	409,694	324,677
	$2,054,589	$2,288,834
Current	$ 977,400	$1,217,714
Long-term	1,077,189	1,071,120
	$2,054,589	$2,288,834

The company's note due to Capital Housing Corp. is to be repaid only at the closing of the Hartford Project currently under development, or from the assets of the subsidiary obligor.

HII CORPORATION

Notes to Consolidated Financial Statements at
December 31, 1981 and December 31, 1980

NOTE 5--CASH ESCROWS

Cash escrow accounts are held by escrow agents at December 31, 1981 and 1980 for release to the company pending certain dates and/or performance in accordance with certain agreements. Escrowed amounts are as follows:

	1981	1980
Working capital/operating deficit escrows:		
Hotel Oakland Associates	$ -	$369,220
Franklin Park Associates	-	138
Building purchase option escrow - Van Nuys	-	27,500
Mortgage security escrow	-	9,340
Partnership construction escrow	11,677	13,465
Replacement reserve escrow	7,633	3,444
Other escrows	106	4,290
	$19,416	$427,397

NOTE 6--PREFERRED STOCK, COMMON STOCK WARRANTS AND DIVIDEND RESTRUCTURING

On September 24, 1980, the company executed agreements with its holder of preferred stock, Classes A and C, and common stock warrants with respect to the same. Under the terms of the original agreements dated December 29, 1972 and December 30, 1975, the company had the following requirements.

1. Class A preferred stock at December 31, 1979 had undeclared accumulated dividends of $163,500 due and was required as of July 1, 1980 and four years thereafter to call and redeem at $100 par 600 shares ($60,000) per year.

2. Class C preferred stock at December 31, 1979 had undeclared accumulated dividends of $235,680.

3. Common stock warrants to purchase 100 shares of the company's stock for $1,000 per share, if not exercised prior to September 30, 1980 and if the company is not registered under section 12(b) or 12(g) of the Securities Exchange Act of 1934, must be repurchased by the company at three times the exercise price.

HII CORPORATION

Notes to Consolidated Financial Statements at December 31, 1981 and December 31, 1980

Upon the execution of the agreements, the following exchanges and issuances took place:

1. Class A and C preferred stock was exchanged for the same principal amount ($889,200) of new Class D non-cumulative preferred stock. Such stock is non-redeemable except as noted below and carries a dividend rate of 6%.

2. Accumulated dividends on Class A and C preferred stock were forgiven. Future dividends on the new Class D preferred stock shall be declared and paid if the current ratio is 2x1 or greater. If the current ratio is 2x1 or greater and dividends are not declared and paid, 10% of the original number of Class D preferred stock shares must be redeemed at par each year in which the dividend is not declared and paid.

3. Common stock warrants expiring September 30, 1980 now expire December 31, 1990, and the repurchase of such warrants becomes effective September 30, 1990.

NOTE 7--PROPERTY ACQUISITION

At the closing of the Van Nuys Project in September 1980, the company acquired a 50% undivided interest in a building located in Los Angeles, California. Such building is carried at $97,457, representing 50% of its original acquisition cost.

During 1981, the company acquired a 50% undivided interest in a second building located in Los Angeles, California. Such property is carried at $275,355, representing 50% of its original acquisition cost.

At the closing of the Hotel Oakland Project in February 1979, the company acquired land located in Oakland, California at a cost of $372,598. In March 1980, the company had an independent appraisal of the land made, whereupon the appraised value was determined to be $2,100,000.

HENRY J. BORNHOFFT COMPANY
Certified Public Accountants

82 DEVONSHIRE STREET
BOSTON, MASSACHUSETTS 02109
617-725-2440

SUPPORTING SCHEDULE

The primary purpose of our examination was to formulate an opinion on the consolidated financial statements of HII Corporation and subsidiaries taken as a whole. The data contained on the following page is not necessary for a fair presentation of the consolidated financial position, results of operations and changes in financial position, but is presented for analytical purposes. Such information has been subjected to the auditing procedures applied in the examination of the consolidated financial statements.

In our opinion, such information is presented fairly in all material respects in relation to the consolidated financial statements taken as a whole.

Henry J. Bornhofft Company

Boston, Massachusetts
May 10, 1982

HII CORPORATION

Consolidated Schedule of Project Fees, Years Ended December 31, 1981 and December 31, 1980

	Income			Notes Receivable December 31, 1981			Unamortized Imputed Interest
	Earned		Deferred December 31, 1981				
	1981	1980		Total	Current	Long-Term	
Hotel Oakland Associates	$ 373,923	$1,641,323	$ 65,558	$1,403,790	$1,205,722	$ 198,068	$ -
Van Nuys Associates	391,328	925,430	968,000	968,000	75,500	892,500	-
Schoolhouse '77 Associates	133,025	459,568	83,105	584,676	523,804	60,872	-
Ken Marr Associates	134,651	32,508	162,506	353,800	270,000	83,800	-
Woodledge Associates	63,863	25,544	124,361	155,091	5,345	149,746	25,385
Intervale-Magnolia Associates	33,334	35,494	60,892	82,488	14,286	68,202	10,100
East/West Investments Associates	-	25,000	-	-	-	-	-
Fieldstone Associates	251,909	-	793,791	990,700	350,000	640,700	-
Poppleton Place Associates	257,982	-	1,043,678	1,301,660	390,000	911,660	-
	1,640,015	3,144,867	3,301,891	5,840,205	2,834,657	3,005,548	$35,485
Less unamortized imputed interest	-	-	-	35,485	634	34,851	
Less amounts due co-developers	341,135	188,290	71,457	-	-	-	
	$1,298,880	$2,956,577	$3,230,434	$5,804,720	$2,834,023	$2,970,697	

See report on supporting schedule.

FHA FORM NO. 2417
Rev. June 1963

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT
FEDERAL HOUSING ADMINISTRATION

Form Approved
Budget Bureau No. 63-R0027

PERSONAL FINANCIAL AND CREDIT STATEMENT

Project Name COLUMBIA POINT Number

Location Boston, MA

Statement of HII CORPORATION As of December 31 19 81

Address One Court Street Boston, MA 02108

ASSETS			LIABILITIES AND NET WORTH		
Cash on hand in banks (Name of depositary)	(Balance)		Accounts payable		$ 262,482
Bank of New England	$ 30,043		Notes payable		1,705,705
			Debts payable in less than one year (secured by mortgages on land and buildings)		
		$ 30,043	Debts payable in less than one year (secured by chattel mortgages or other liens on assets)		
Accounts receivable	$ 1,227,884				
Less Doubtful Accounts	-0-	1,227,884			
Notes receivable	$ 2,834,023		MHFA		119,066
Less Doubtful Notes		2,834,023			
Stocks and Bonds - Market Value (Schedule A-reverse side)			Other current liabilities: (describe)		
			Dues to Affiliate	$ 136,875	
Other current assets: (describe)			Accrued Exp. & Taxes	406,027	
Prepaid Dev. Costs	$ 486,384				542,902
Prepaid Expenses	3,679		Total Current Liabilities		$ 2,630,155
		490,063	Debts payable in more than one year (secured by mortgages on land and buildings)		195,250
Total Current Assets		$ 4,582,013			
Real Property - at net * (Schedule B-reverse side)		832,424	Debts payable in more than one year (secured by chattel mortgages or other liens on		
Machinery Equipment and Fixtures - at net					
Life Insurance (Cash value less loans	$				
Other assets (describe):			Other liabilities: (describe)		
Notes Rec. Long Term	$ 3,656,651		Note Payable-Long Term	881,939	
Cash Escrow	19,416		Deferred Income Taxes	$ 428,000	
Investment in Partnership	62,563		Deferred Income	3,230,434	4,540,373
Accounts Rec.	103,602		TOTAL LIABILITIES		$ 7,365,778
Miscellaneous	19,942	3,862,174	Net Worth		1,910,833
TOTAL ASSETS		$ 9,276,611	TOTAL LIABILITIES AND NET WORTH		$ 9,276,611

* Cost, including improvements, less depreciation.

Accounts and Notes Receivable:

Amounts, if any, due from partners (P), employees (E) or relatives (R), specify:

Type (P, E or R)	Name	Address	Amount
E	Denis Blackett	One Court St.	$ 30,751

Delinquencies:

If any taxes, mortgage payments or other liabilities are past due, specify:

Type Liability	Amount	Circumstances

Insurance:

Life (face value) Nat'l Life $ 430,000

Beneficiary H.I.I. CORP.

Notes Payable:

Payable to	Amount	Maturity Date
Schedule Attached	$2,587,644	VAR

Pledged Assets:

Type Pledged	Amount	Offsetting Liability

Legal Proceedings:

If any legal proceedings have been instituted by creditors, or any unsatisfied judgments remain on record, give full details:

NOTE: If more space is required use separate sheet of paper writing on one side only.

(Over)

SCHEDULE A - STOCKS AND BONDS

Description	Cost	Current Market Value (At date of this Statement)	If Listed, Name Exchange
	$	$	

SCHEDULE B - REAL PROPERTY (INDICATE PRIVATE RESIDENCE, IF ANY)

Location and Description of Land and Buildings Owned	Age	Original Cost	Market Value	Assessed Value	Mortgaged For-	Insured For-
226-13th St., Oakland, CA (Land)		$372,812	1,500,000	642,875	-0-	Replacement
725 S. Spring St., Los Angeles, CA (L&B)	60	372,597	402,900	402,900	195,250	Cost
74-76 Intervale St., Boston, MA (Land)	10					
99-101 Brunswick St. Boston, MA (Land)	10	207,375	119,066	119,066	119,066	X
TOTALS		952,784	2,021,966	1,164,841	314,310	

Title:

The legal and equitable title to all pieces of the above-described real estate is solely in my name, except as follows:

Location of Real Property	Name of Title Holders

References:

Bank— Bank of New England, Boston, MA (James Sweeney, Vice President)
Security Pacific Bank, San Francisco, CA (Robert Hickey, Vice President)

Trade—	Peabody & Brown	One Boston Place
	K. Powell Assoc.	47 Winter Street
	D.A. MacIssacc	354 Congress St.
	Subtractive Technology	338 Newbury Street

I HEREBY CERTIFY that the foregoing figures and the statements contained herein, submitted by me for the purpose of obtaining mortgage insurance under the National Housing Act, are true and give a correct showing of my financial condition as of this date.

Signed this 15 day of November, 19 82

(Name) [illegible]

WARNING

U.S. Criminal Code, Section 1010, Title 18, U.S.C., "Federal Housing Administration transactions", provides in part: "Whoever, for the purpose of . . . influencing in any way the action of such Administration . . . makes, passes, utters, or publishes any statement, knowing the same to be false, . . . shall be fined not more than $5,000 or imprisoned not more than two years, or both."

GPO 886-273

☆U.S. GOVERNMENT PRINTING OFFICE: 1971—704-089/1170

SCHEDULE OF NOTES PAYABLE

	1981	
Promissory Notes		
Cooperative Assistance Fund:		
Due February 1982 and December 1984	$218,750	
Robert Dollar Company:		
Due January 1982 and 1983	338,961	
Massachusetts Venture Capital Corporation:		
Due December 1982 and 1983	150,000	
Due December 1982, 1983 and 1984	49,500	
Midtown Co-Developers:		
Due January 1982	186,368	
Boston Financial Technology Group, Inc.:		
Due June 1982	142,000	
Due June 1983	170,000	
Due June 1982	75,000	
Promissory Notes - General	13,334	
Due June 1981	-	
Non-Interest Bearing - Other	196,360	
Capital Housing Corporation:		
Due 1981	200,000	
Bank of New England	601,077	
State Street Bank	240,000	
Other	6,294	
Total Short Term:		$1,705,705
Total Long Term:		881,939
GRAND TOTAL		$2,587,644

Minority Utilization

HII Corporation (exclusive of its affiliated management company -- Tenant Services, Inc.) has 12 employees of which six are black, one is Mexican-American and the remainder are Caucasian. Mr. Blackett, the President and principal stockholder of the company, is black. The senior staff includes four individuals of whom two are minorities. The balance of the professional staff of five includes three minorities and the clerical staff includes two minorities. The Company has always attempted to foster the employment of minorities throughout its organization and has been successful in achieving this objective. It should also be noted that Tenant Services, Inc., who will be joint venturing the management of the development, is an affiliate of HII Corporation and its background and "minority utilization" efforts are described in another section of this proposal. Tenant Services represents an important extention of HII's professional capabilities. In addition, as mentioned in another section of this proposal, HII has sought and found minority construction and architectural firms to participate with it in the development and construction of its projects. It has also worked closely with its contractors to assure the inclusion of minority subcontractors and the employment of minorities in the construction force.

MANAGEMENT QUALIFICATIONS

Properties under management now by

Tenant Services, Inc. and its affiliate

Anchor Management Co., Inc.

Property Name:	Wayne Apartments
Property Owner:	Wayne Apartments Co. (S. Insoft General Partner)
Location:	Boston, MA
Type of Site:	Residential
Type of Construction:	Brick Rehabilitation
Income & Subsidy Mix:	Section 8, Multi-Family, Low Income
Number & Size of Units:	8 Studios 116 1 BR 189 2 BR 32 3 BR 10 4 BR 4 5 BR 359 Units
Financing:	Unity Savings Bank Chicago, IL
Mortgage Status:	Current
Marketing Goals:	Achieved

Property Name:	Bergen Circle
Property Owner:	Girard Avenue Associates (HII Corp. General Partner)
Location:	Springfield, MA
Type of Site:	Residential and Commercial
Type of Construction:	Brick High-Rise, Wood Frame and Brick Town Houses, New Construction
Income & Subsidy Mix:	Section 8, Section 236, Rental Asst. Program, Market, Multi-Family and Elderly, Low & Moderate Income
Number & Size of Units:	89 1 BR 72 2 BR 20 3 BR 20 4 BR 201 Units w/3,000 sq. ft. commercial
Financing:	Massachusetts Housing Finance Agency Boston, MA
Mortgage Status:	Current
Marketing Goals:	Achieved

Property Name:	Concord Houses
Property Owner:	Concord Houses Associates (HII Corp. General Partner)
Location:	Boston, MA
Type of Site:	Residential
Type of Construction:	Brick, New Construction
Income & Subsidy Mix:	Rental Asst. Program, Section 23, Section 236, Market, Multi-Family, Elderly, Low & Moderate Income
Number & Size of Units:	144 1 BR 27 2 BR 8 3 BR 2 4 BR 181 Units
Financing:	Massachusetts Housing Finance Agency Boston, MA
Mortage Status:	Current
Marketing Goals:	Achieved

Property Name:	East Canton Street
Property Owner:	East Canton Street Associates (HII Corp. General Partner)
Location:	Boston, MA
Type of Site:	Residential
Type of Construction:	Brick Rehabilitation
Income & Subsidy Mix:	Section 8, Multi-Family, Low & Moderate Income
Number & Size of Units:	40 1 BR 40 2 BR 80 Units
Financing:	BMFC, Inc. Boston, MA
Mortgage Status:	Current
Marketing Goals:	Presently in Rehabilitation

Property Name:	Fieldstone
Property Owner:	Fieldstone Associates (HII Corp. General Partner)
Location:	Boston, MA
Type of Site:	Residential
Type of Construction	Brick Rehabilitation
Income & Subsidy Mix:	Section 8, Multi-Family and Elderly
Number & Size of Units:	44 1 BR 44 2 BR 88 Units
Financing:	BMFC, Inc. Boston, MA
Mortgage Status:	Current
Marketing Goals:	Presently in Rent-Up

Property Name:	Franklin Park
Property Owner:	Franklin Park Associates, Ltd. (HII Corp. General Partner)
Location:	Boston, MA
Type of Site:	Residential & Commercial
Type of Construction:	Brick Rehabilitation
Income & Subsidy Mix:	Section 8, 13-A, Market, Multi-Family
Number & Size of Units:	95 1 BR 99 2 BR 10 3 BR 5 4 BR 11 5 BR 221 Units w/ 3,000 sq. ft. commercial
Financing:	Massachusetts Housing Finance Agency Boston, MA
Mortgage Status:	Current
Marketing Goals:	Achieved

Property Name:	Hotel Oakland
Property Owner:	Hotel Oakland Associates (HII Corp. General Partner)
Location:	Oakland, CA
Type of Site:	Residential and Commercial
Type of Construction:	Brick Rehabilitation
Income & Subsidy Mix:	Section 8, Elderly, Low & Moderate Income
Number & Size of Units:	77 0 Studios 237 1 BR 1 2 BR 315 Units w/22,000 sq. ft. commercial
Financing:	First Interstate Bank Pasadena, CA
Mortgage Status:	Current
Marketing Goals:	Achieved

Property Name:	Intervale-Magnolia
Property Owner:	Intervale-Magnolia Associates (HII Corp. General Partner)
Location:	Boston, MA
Type of Site:	Residential
Type of Construction:	Brick Rehabilitation
Income & Subsidy Mix:	Section 8, Low Income, Multi-Family
Number & Size of Units:	3 1 BR 39 2 BR 33 3 BR 13 4 BR 88 Units
Financing:	Massachusetts Housing Finance Agency Boston, MA
Mortgage Status:	Current
Marketing Goals:	Achieved

Property Name:	Lawrenceville
Property Owner:	Lawrenceville Associates (HII Corp., General Partner)
Location:	Boston, MA
Type of Site:	Residential
Type of Construction:	Brick Rehabilitation
Income & Subsidy Mix:	Section 236 - Rent Supplement Multi-Family - Low Income
Number & Size of Units:	6 Studio 26 1 BR 81 2 BR 20 3 BR 14 4 BR 1 5 BR 1 6 BR 149 Units
Financing:	Massachusetts Housing Finance Agency Boston, MA
Mortgage Status:	Workout Agreement with MHFA
Marketing Goals:	Presently in rehabilitation

Property Name:	Mt. Hope Court Apartments
Property Owner:	Urban League of Rhode Island
Location:	Providence, RI
Type of Site:	Residential
Type of Construction:	Wood Frame, New Construction
Income & Subsidy Mix:	Section 8, Multi-Family, Low Income
Number & Size of Units:	6 1 BR 10 2 BR 10 3 BR 10 4 BR 36 Units
Financing:	U.S. Department of Housing & Urban Development
Mortgage Status:	Current
Marketing Goals:	Achieved

Property Name:	Norwell
Property Owner:	Norwell Associates (HII Corp. General Partner)
Location:	Boston, MA
Type of Site:	Residential
Type of Construction:	Brick Rehabilitation
Income & Subsidy Mix:	Section 8, Low Income, Multi-Family
Number & Size of Units:	2 1 BR 18 2 BR 25 3 BR 45 Units
Financing:	Massachusetts Housing Finance Agency Boston, MA
Mortgage Status:	Current
Marketing Goals:	Achieved

Property Name:	Poppleton
Property Owner:	Poppleton Place Associates (HII Corp. General Partner)
Location:	Baltimore, MD
Type of Site:	Residential
Type of Construction:	Brick Rehabilitation
Income & Subsidy Mix:	Section 8, Multi-Family, Low Income
Number & Size of Units:	11 1 BR 100 2 BR 21 3 BR 9 4 BR 141 Units
Financing:	BMFC, Inc. Boston, MA
Mortgage Status:	Current
Marketing Goals:	Presently in Rent-Up

Property Name:	Schoolhouse 77
Property Owner:	Schoolhouse 77 Associates (HII Corp. General Partner)
Location:	Boston, MA
Type of Site:	Residential
Type of Construction:	Brick & Wood Frame, Rehabilitation and New Construction
Income & Subsidy Mix:	Section 8, Multi-Family and Elderly, Low Income
Number & Size of Units:	66 1 BR 56 2 BR 2 3 BR 4 4 BR 128 Units
Financing:	Merrill Lynch Huntoon Paige, Inc. New York, NY
Mortgage Status:	Current
Marketing Goals:	Achieved

Property Name:	Van Nuys
Property Owner:	Van Nuys Associates (HII Corp. General Partner)
Location:	Los Angeles, CA
Type of Site:	Residential and Commercial
Type of Construction:	Brick Rehabilitation
Income & Subsidy Mix:	Section 8, Elderly, Handicapped, Low and Moderate Income
Number & Size of Units:	132 1 BR 157 2 BR 10 3 BR 299 Units w/24,000 sq. ft. commercial
Financing:	Merrill Lynch Huntoon Paige, Inc. New York, NY
Mortgage Status:	Current
Marketing Goals:	Presently in Rent-Up

Property Name:	Woodledge
Property Owner:	Woodledge Associates (HII Corp. General Partner)
Location:	Boston, MA
Type of Site:	Residential
Type of Construction:	Brick Rehabilitation
Income & Subsidy Mix:	Section 8, Low Income, Multi-Family
Number & Size of Units:	8 1 BR 66 2 BR 48 3 BR 8 4 BR 130 Units
Financing:	Massachusetts Housing Finance Agency Boston, MA
Mortgage Status:	Current
Marketing Goals:	Achieved

Property Name:	Woodside Gardens
Property Owner:	Ken Marr Associates (HII Corp. General Partner)
Location:	Annapolis, MD
Type of Site:	Residential
Type of Construction:	Brick Rehabilitation
Income & Subsidy Mix:	Section 8, Multi-Family, Low Income
Number & Size of Units:	52 2 BR 92 3 BR 144 Units
Financing:	Merrill Lynch Huntoon Paige, Inc. New York, NY
Mortgage Status:	Current
Marketing Goals:	Achieved

MANAGEMENT QUALIFICATIONS

There is no litigation pending or adjudicated with a finding of liability against Tenant Services, Inc. or Anchor Management Co., Inc. in the previous five years relating to financial aspects of management, alleged discrimination in hiring, tenant selection or tenant relationships, or otherwise bearing upon the entity's effectiveness as a manager.

TENANT SERVICES, INC.

Joseph T. Polonski

Joseph T. Polonski
Vice President

Date November 1, 1982

MANAGEMENT QUALIFICATIONS

List of All Certified Housing Managers

Joseph T. Polonski - Certified Property Manager
Vice President-Finance

Marcia Y. Anderson - Certified Property Manager (Candidate)
Director of Property Management

Carole Quinerly - Accredited Resident Manager
Property Manager

MANAGEMENT PLAN

INTRODUCTION

To insure the success of the Franklin Field NSA development, an intensive management effort will be required of the developer, Housing Innovations, Inc., and the managing agent, Tenant Services, Inc. The following plan is intended to respond to the special needs of this proposed development.

I. ROLE AND RESPONSIBILITY OF THE SPONSORS.

A. Supervisory Relationships.

Tenant Services, Inc. (TSI) shall, except as outlined below, be responsible for the day-to-day operation of the project. It is contemplated that the staff of the development will be responsible to the assigned Property Manager. The assigned Property Manager, in turn, will be accountable to the Regional Property Manager of TSI whose immediate supervisor is the Director of TSI. In turn, TSI answers to the owners, Housing Innovations, Inc.

B. Actions Requiring Sponsor Approval.

The Management Agent will be required to consult with Housing Innovations and HUD whenever there are significant deviations from the Management Plan and the project budget. The formulation of significant new policies will also require consultation with the Sponsor and HUD.

C. Management Decisions Independent of the Sponsor.

The Sponsor will clearly define the duties and responsibilities of the Property Manager so as to minimize the need for consultation over routine operational decisions. The areas of responsibility will include virtually every aspect of day-to-day operations, including administrative and maintenance matters, personnel administration, and tenant and community relations. The Sponsor will closely monitor the Property Manager's performance in these areas during the early stages of project occupancy and operations so as to assure a clear understanding of the Sponsor's expectations.

D. Key Contact Person for the Managing Agent.

The managing agent will be directly responsible to the Assistant to the President as his chief contact with the owner. The Assistant to the President is responsible for monitoring all projects managed by TSI by means of a monthly indices report which looks at the following critical areas of management performance:

- Income and Expenses
- Rent Collection
- Exterior and Interior Appearance
- Accounts Payable
- Tenant Selection
- Vacancy Status
- Tenant Satisfaction with respect to Maintenance and Janitorial Services.

Monthly indices reports will also be done on this development by the Assistant to the President for review by the Owner, Director of Property Management and Regional Property Manager. We have enclosed as Exhibit A an indices report for our development in Springfield. The Assistant to the President, by means of these reports, can report immediately to the Owner if there are any problem areas within management.

E. Responsibility of Social Services.

The Property Manager and the project staff will be responsible for working with any existing social service program and developing a full social service program which in its broadest terms will include coordination of recreational activities for the children of the development, establishment of a resident organization and coordination of activities and meetings to keep residents informed of social, recreational services that are available in their community. Regarding the social services, the Property Manager will be responsible for referring residents to the appropriate agencies.

F. Responsibilities of the Sponsor and the Managing Agent.

The Sponsor, as explained above, will only be responsible in establishing management policies and reviewing project budgets and monthly indices for the development. In addition, the Sponsor will monitor the performance of the management agent on an intensive basis during the first year of operations and on a less intensive, but regular basis thereafter. The Management Agent, on the other hand, will be responsible for the day-to-day operation of the project. During the rehabilitation period and through the first years of operation, the Regional Property Manager will devote almost all of his time exclusively to this development. Once the development is fully occupied, the Regional Property Manager will monitor the management operation by: (1) daily telephone contact with the Property Manager (2) review of weekly reports regarding vacancy, tenant selection, expenses, maintenance which the Property Manager will be required to complete and forward to the Regional Property Manager; (3) on-site inspections with the Property Manager at least once a month at which time the Regional Property Manager will meet the staff of the development and possibly the resident organization, if so requested. The Regional Property Manager and the Property Manager will also review the budget during these site visits. (4) review of monthly indices reports as explained in Section I. D. above.

G. Expenses of the Management Agent.

All services, whether covered or not by the management fee, will be consistent with those guidelines established in the HUD Handbook 4381.5 paragraph 3. The title of this handbook is "Compensation for Management Services in Multi-Family Housing Projects with Insured or HUD-held Mortgages".

II. PERSONNEL POLICY AND STAFFING ARRANGEMENTS.

A. Equal Opportunity Requirements.

TSI is a minority-owned company. The composition of the staff is identified in Exhibit B.

B. Employment of Project Residents.

Every effort will be made to employ existing residents for the management staff of the development. In addition, maintenance employment opportunities may also be available.

Finally, the management staff will work closely with a representative organization of the residents to establish these policies and objectives.

C. Projected Staffing Needs

Property Manager

Two Maintenance Men

Two Janitors

Clerical Staff Person

D. Project Staffing.

Job Description/Organizational Charts.

1. Enclosed in this package is Exhibit C, which illustrates a complete breakdown of job descriptions, responsibilities and an organizational chart for the development.

E. Personnel Policy.

1. Training and Promotion Opportunities.

Continuous review of employee responsibilities and the adoption of new and more effective techniques and procedures will be the principal mechanism for assuring employee efficiency and providing a basis for future promotions to positions of higher responsibility. In this regard, efforts will be made not only to improve upon skills for the employee's existing job category, but to provide training in related areas requiring a higher level of skills. Employees will be encouraged to take courses offered by the National Center for Housing Management and the Institute of Real Estate Management to improve their management skills.

2. Fringe Benefits.

Final decisions concerning the extent of fringe benefits to be provided the management staff must await further clarification of the project's

operational budget and experience with the budget. Minimally, all full-time employees will be entitled to sick and annual leave after an initial probationary period, national holidays and overtime pay for hours worked in excess of forty (40) per week. Other policies pertaining to health and/or hospital benefits, training allowances, etc., will be developed in consideration of budgetary experience.

(3) Employee Grievance Procedures.

Employee grievances shall be initially handled by the employee's immediate supervisor, with the right to appeal decisions to the next higher authority. Where satisfaction is not achieved through the Property Manager, further appeals will be handled by the Regional Manager as the final authority. In the case of grievances of the Property Manager, the Director of Property Management will serve as the final authority in resolving situations not satisfactorily handled by the Regional Manager.

(4) Employee Termination Procedures.

Employee terminations for all positions below Property Manager shall be effectuated by the Property Manager after review of the circumstances with the Regional Manager. In these situations, the Property Manager will review the causes for termination with the Regional Manager. If, in the judgement of both, the circumstances warrant giving the employee an opportunity to remedy the possible causes for termination, the employee shall be so advised and placed on probation for an appropriate period of time. This decision shall be conveyed to the employee by the Property Manager. Failure to remedy the condition(s) shall result in termination by the Property Manager.

III. PLANS AND PROCEDURES FOR PUBLICIZING AND ACHIEVING EARLY OCCUPANCY.

A. Advertisement of Units.

As noted in the Affirmative Fair Housing Marketing Plan, advertising will be initiated approximately three months before completion of construction. Advertising will be done primarily through the newspapers. In addition, local organizations who deal with low and

moderate income persons, and large families, will be contacted. All of these activities will be directed to insure the immediate occupancy for as many years as possible upon their availability.

B. Affirmative Marketing.

Affirmative marketing practices will be utilized as outlined in the Affirmative Fair Housing Plan that has been attached.

C. Plans to Insure Economic and Racial Mix of Tenants.

As outlined in the Affirmative Fair Housing Marketing Plan, a plan will be undertaken to insure that at least 25 percent of the residents will represent minority groups. In addition, it is hoped that the intensive services being provided by the development will attract not only low-income persons but also moderate-income persons who will be eligible under the Section 8 program, as well as low and moderate-income families. To that end, we will undertake an intensive outreach effort through personnel departments of the major local businesses and employers. Initially, contact will be made by letter (see Exhibit D) with follow-up telephone calls and personal visits.

D. On-Site Office.

An on-site office will be opened to take applications upon the initiation of the marketing effort. Office hours will be from 10:00 a.m. to 7:00 p.m. on week days for the convenience of both employed and unemployed applicants. In addition, the office will be open on weekends between 9:00 a.m. and 12:00 noon.

E. Inspection of Units.

During the initial rent-up period, applicants will be able to view a vacant apartment to see a typical layout. It is the intent of Management to collect security deposits in accordance with state law. Therefore, for the protection of both Tenant and Management, approved applicants will inspect their assigned units with a Management representative prior to move-in and both parties will sign a Statement of Conditions. The original will be retained in a Tenant File and a copy will be given to the tenant within the first 30 days of occupancy. It is understood that Management is required to give the list of existing damage (if any) to the resident if the resident requests it within the first

15 days of his/her occupancy. However, it is the opinion of Management that giving a copy of Statement of Conditions to residents initially is good management procedure and will avoid questions later, especially at the time of move-outs.

F. Orientation Services.

At the time of the initial interview, the interviewer will describe the general characteristics of the housing, its amenities, requirements for eligibility and application procedures. A written summary of the development's features will be provided to each applicant whose pre-application would appear to justify the submission of a normal application for admission. The summary will include a description of the application review process and the tenant will be offered any appropriate assistance that may be required to complete the application.

Applicants who are eligible to occupy an apartment and who are approved will be furnished with a set of materials that will describe, in layman's terms, the responsibilities of the tenant and the sponsor, and a sample copy of the lease to be executed. Applicants who agree to comply with the terms of the lease will be offered an available apartment of an appropriate size.

Each approved tenant will also be furnished with a resident handbook which will serve as an initial reference for all matters related to apartment occupancy. The handbook will also include information on the operations and care of apartment equipment and suggested methods of housekeeping and care of that unit to prevent frequent need for maintenance service. Enclosed is a Resident Handbook developed by TSI for its Concord Houses development. (See Exhibit E). The handbook for this development will follow the same format but be tailored to the particular development. Additional information will be provided with regards to tenant organizational activities and social services that are available at the local public and private agencies. With regard to existing residents at this development, a series of meetings will be held to explain the policies of Tenant Services, Inc. It is the intent of Tenant Services, Inc., from the initial take-over, to inform all residents that eligibility for the Section 8 Subsidy is contingent upon a resident being in good standing with respect to rent, housekeeping, conformance with all resident obligations. Once rehab is completed in the apartments of existing residents, they along with approved new

residents will be required to attend an orientation session. The purpose of the orientation session is to inform residents of Management policies, of proper care of the appliances of the unit, of use of laundry rooms and community rooms, of neighborhood and municipal services, and of the resident organization. Slides of the apartment features are shown by the Property Manager and fully explained. The staff of the development will be introduced to the residents at these meetings. A representative from the resident organization will also be invited to make a brief statement. In order to "break the ice" for new residents, and instill a sense of community among all residents, each orientation session will be structured to include both existing residents and new residents who will be living in the same doorway. Enclosed as Exhibit F is a sample orientation package that will be given to each new resident at the session.

Post-occupancy sessions will be held with the resident within the first six months after construction is completed. It has been the experience of Management that holding these meetings on a building-by-building basis promotes better communication between the families who share a common entryway and allows Management to deal specifically with the problems unique to that particular building. The children of the residents are expected to attend both the orientation and post-occupancy sessions.

G. Tenant Selection.

As stated above, existing residents will be surveyed thoroughly and screened to assure that they are residents in good standing. With respect to vacant units, applicants will be required to complete an application form which will be carefully checked in terms of present and past rent paying history, of housekeeping, of relationship with Management, of relationship with other residents, of respect for property by applicant, children and guests, and of credit history. Applicants found satisfactory in all areas will be considered for residency at the development. Applicants with unsatisfactory references in any of the above areas will be notified in writing that they are rejected and the reasons why. Final decisions regarding application approval/rejection will be totally shared by the Director of Property Management, Regional Property Manager and Property Manager during initial rent-up. With increased experience in this area, it is expected that the Property Manager

will assume full responsibility for processing applications. The Regional Property Manager will continue to review applications prior to acceptance. Once initial occupancy has been achieved, a Tenant Orientation Committee will be organized to meet approved applicants and introduce them to "life at the development" from a resident viewpoint. It has been our experience that this procedure allows new residents to feel comfortable as soon as they move in and to immediately know some of their neighbors.

IV. PROCEDURES FOR DETERMINING TENANT ELIGIBILITY FOR CERTIFYING AND RECERTIFYING INCOMES.

A. Responsibility for this Function.

The Property Manager will be responsible for this function. Tenant eligibility for initial occupancy with respect to income will be based on written verification of income from employers, social workers or other sources. Persons owning their own businesses will be required to submit W-4 forms for the previous year. All applicants will have to be within the established Section 8 income limits for the area.

In accordance with Section 8 guidelines, residents will be recertified annually according to the following established TSI procedure:

1. A card file for all residents to be recertified should be set up. File should be divided into twelve months.

2. Index card should indicate the following;

   - Resident Name
   - Resident Address and Apartment Number
   - Monthly Rental Rate and Subsidy Program
   - Bedroom Size
   - Number of Persons in Household
   - Occupancy Date

3. Card should be used to indicate recertification history, e.g.:

Recertified	1/1/76
New Income Information Requested	11/1/76
Recertified	1/1/77

4. Cards should be filed alphabetically by recertification month.

5. Each month, index cards should be reviewed. Letters requesting updated income information should be sent out to tenants two months prior to recertification date. If information is not received by one month prior to recertification date, a second letter should be sent requesting necessary income information. This letter should indicate that subsidy and/or occupancy will be threatened if information is not received.

B. Background of the Property Manager Regarding this Function.

The Property Manager will probably have prior experience regarding certification and recertification requirements. But, regardless of experience, the Manager will be trained intensively by the Regional Property Manager and the Director of Tenant Services, Inc. and will receive on-the-job training on other developments prior to his/her taking over the position at the development. The Director of TSI will closely monitor the performance of the Property Manager regarding certification requirements.

C. HUD Requirements

HUD requirements covering family size and composition relating to unit size, will be fully explained to the Property Manager during the training period.

V. PLANS FOR CARRYING OUT AN EFFECTIVE MAINTENANCE AND REPAIR PROGRAM.

An overview of the maintenance program shall be prepared yearly by the Property Manager and reviewed for appropriate modifications and adjustments in order to make it responsive to specific needs of the project and otherwise responsive to limitations of the operational

MANAGEMENT PLAN

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budget. The program will be designed to reflect consideration of three major areas--routine maintenance, preventive maintenance and repairs.

Routine maintenance is that level of maintenance performed on a regular basis (daily, weekly or as required) and is designed to achieve cleanliness and attractive conditions both within the buildings and on the grounds.

Preventive maintenance is that level of maintenance that is required to prevent more serious corrective actions through the undertaking of scheduled activities that will keep the item or system in good repair, i.e., the preventive maintenance of the mechanical systems (heating, water supply, elevator, etc.). Regular inspection of non-mechanical areas and the performance of basic repair shall be similarly undertaken to prevent the need for more extensive corrective actions at a future date.

Repairs are those actions that are either requested by the tenant or observed by Management in the course of apartment inspections of interior and exterior public areas and equipment. Also included in the latter are failures in mechanical systems or damages that have been sustained by the building, grounds or equipment. Repairs are of two levels--those which can be performed by on-staff personnel and those requiring outside services to bring the item back into good service or condition. Every reasonable effort shall be used to avoid the use of outside services in the interest of operational economics. Such will be accomplished by maintaining equipment in good condition through preventive maintenance scheduling; orientation of the tenants on the proper operations of mechanical and other items; and by the institution of training programs that will increase the skills of janitorial personnel to perform maintenance level duties.

To achieve the above objectives, the following maintenance schedule will be taken:

(1) Daily

(a) Clean exterior grounds
(b) Clean around dumpster areas
(c) Sweep and mop public landings on all floors of each building.

D. Key Contact Person for the Managing Agent.

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The Property Manager and the project staff will be responsible for working with any existing social service program and developing a full social service program which in its broadest terms will include coordination of recreational activities for the children of the development, establishment of a resident organization and coordination of activities and meetings to keep residents informed of social, recreational services that are available in their community. Regarding the social services, the Property Manager will be responsible for referring residents to the appropriate agencies.

(d) Sweep stairwells
(e) Sweep laundry rooms
(f) Police grounds and sitting areas for paper and other debris.
(g) Sweep and dust management office.
(h) Empty public trash disposal cans.

(2) Twice Weekly

(a) Clean lint traps in laundry equipment.
(b) Mop laundry rooms.

(3) Weekly

(a) Remove graffiti from walls.
(b) Dust light fixtures.

(4) As Required

(a) Sweep community rooms on days following use; mop bi-weekly, unless required more frequently.
(b) Change light bulbs in public areas (indoors) and out on an established lightbulbing schedule.
(c) Dust walls and fixtures in public halls weekly.

(5) Semi-Annually/Annually

(a) Maintenance personnel will inspect and repair heating systems regularly.
(b) Circulating pumps will be oiled and forced hot water systems bled twice annually.
(c) Water pressure, temperature, heating assembly of the D.H.W. are checked annually and the heater tank will be drained.
(d) Similarly, the boiler and forced hot water will be annually checked and bled.
(e) The gas furnace will be checked and adjusted.

(6) Other Activities

(a) Perform apartment repairs as requested and assigned.

(b) Seasonal grounds maintenance (snow removal, lawn and shrubbery care).
(c) Maintenance of outdoor recreation equipment.
(d) Inspection of appliances (refrigerators and stoves).
(e) Installation and maintenance of air conditioning equipment per instructions.
(f) Instruct in operations of appliances.
(g) Assist in the cleaning of apartments related to tenant moves.
(h) Extermination.

The above activities shall be performed under the general direction of the Maintenance Man. The latter shall assist in janitorial duties for two or three hours of each day, the balance of his time to be devoted to apartment and other repairs and maintenance of equipment systems as required. All maintenance personnel shall meet daily to discuss and coordinate the day's activities. A similar meeting shall be held between the Maintenance Man and the Property Manager for purposes of coordination and to allow for the input of apartment repair requests into the daily maintenance schedule.

Inspection schedules shall be performed at two levels--those applying to public and supportive areas (halls, mechanical equipment and rooms related thereto, grounds, etc.) and the individual apartments.

Apartment inspections shall be performed by the Property Manager on an annual basis (unless it becomes evident that more frequent inspections are in order). These inspections are designed to determine that the unit is being properly maintained and cleaned and that mechanical equipment is in good repair. Residents will receive notification to be at home during the inspection. In addition to checking for maintenance problems in the apartment that have not been called in by the resident, the Property Manager will pay particular attention for the following:

- Poor Housekeeping
- Additional beds or persons in the apartment
- Evidence of Pets
- Waterbeds
- Extra locks on doors
- Washing machines or freezers
- Paint jobs on walls

If any of the above problems are found, the resident is to be notified immediately that they are in violation of the lease agreement and that the situation must be resolved immediately. The Property Manager will alert the appropriate social service agency if the problem is strictly poor housekeeping. Follow-up inspections will be made within one week of initial inspection. Pictures will be taken at the second inspection. If the situation has not improved, the Property Manager will take necessary action to remedy the situation.

Inspection of non-residential areas shall be performed on two levels:

(1) The Property Manager and maintenance personnel will be trained to visually inspect all areas of the buildings and grounds while in the course of performing their normal duties on a day-to-day basis. Annually, all such areas should receive a more intensive inspection where each component of the building (bearing walls, roof, windows, fountains, etc.) and grounds will be examined against a check-list of specific items. These latter inspections shall be performed by the Property Manager and maintenance personnel.

(2) Scheduled inspections shall be made of mechanical systems in compliance with the instructions and warrantee certificates.

(a) Inventory and Service of Mechanical Equipment and Appliances.

A file will be maintained on all appliances and mechanical equipment. Each file will identify the item by its model and serial number, the date of purchase and installation, the existence or expiration of warrantees., guarantees and service contracts and a record of the date and extent of repairs.

As indicated above, mechanical equipment serving total project needs will be inspected routinely or in conformance with preventive maintenance schedules. Appliances will be inspected for condition and serviceability prior to installation within the units and during the course of the annual apartment inspection. As move-outs occur, the appliances in each apartment will be inspected to detect

any damages or requirements for repair that would justify an assessment of appliances (refrigerators and stoves) to exceed the number of apartments so as to provide replacement units where appliances require removal for repair.

(b) Inspection and Maintenance of Units Prior to Move-outs.

(i) Residents will be required to notify the management office by certified mail of intention to move at least 15 days prior to the actual moving date. The Property Manager will then notify resident by certified mail of the time and date of inspection, which must be within 5 days or 5 days after resident's move. The Property Manager and resident will inspect the apartment together. If there is any damage to the apartment, Management may withhold a portion of the security deposit to cover costs. However, the Property Manager must send the resident, by first class mail to his last know address, a written list of the damages claimed, together with a statement of costs actually incurred. If Management fails to do so within 30 days after termination, Management loses the right to the deposit to offset damages. These provisions a will be adapted to conform with Massachusetts state law on security deposits.

(ii) It is the goal of Management for vacancy turnover to be within thirty days. Therefore, upon receipt of notification of the move, the Property Manager will examine a continually updated waiting list of prospective tenants and contact the applicant at the top of the list desiring an apartment of the size to be available. Administrative work necessary to a determination of eligibility shall be initiated.

(iii) Upon determining the eligibility of the prospective tenant, a formal offering of the apartment shall be made and, if accepted, a new lease executed. Applicable policies and procedures as regard occupancy in the development shall be reviewed with the tenant.

(iv) The move-in and move-out date(s) shall be coordinated through the management office and the Maintenance Staff will be generally available on those dates to assist in making the moving procedure run smoothly.

(c) Schedule for Painting and Redecorating.

Design of the structure and the use of material and finishes requiring minimal maintenance is expected to result in little need for exterior painting.

Exterior surfaces that are painted, will be closely inspected annually to determine the need for repainting and repair.

Similarly, surface finishes in public areas that are expected to have a high level of tenant traffic and use will be of a type that will require minimal need for painting, refinishing or replacement. A high level of routine maintenance (washing, dusting, spot removal, repair) should also minimize the need for these drastic actions. Notwithstanding, ceilings and other areas where painting and redecorating is required, will be inspected and repainted every two years to maintain a fresh appearance.

The interior of each apartment will be repainted by Management every three years. The painting will be provided at no additional expense to the resident from a standard selection of colors. Vacated apartments will be repainted prior to occupancy by the new resident.

(d) Garbage and Trash Removal.

Trash receptacles will be conveniently placed at several locations on the development for trash removal by the residents. It will be the responsibility of each resident to remove trash from the apartments to the receptacles. If residents have large items that they would like removed, they will be requested to notify Management so that a special pick-up can be made. The Maintenance Man will monitor the emptying of the receptacles by the trash removal company to assure that

it is in accordance with contract (i.e., correct number of pick-ups per week).

(e) Major Repairs

Through the provisions of a properly executed preventive maintenance program and immediate attention given to needed minor repairs, it is anticipated that major repairs will be minimized. Notwithstanding, where such cannot be avoided, the Maintenance Man will provide interim repairs where possible and determine the need for more extensive repairs by outside services. Depending upon the nature of the equipment or system, service contracts may be provided by appropriate firms. The objective, however, will be accomplished through a continuous training program of all maintenance personnel to improve the level of their skills and to provide them with a level of proficiency that will permit most repairs by the maintenance staff.

(f) Grounds Upkeep and Maintenance.

Outside areas should be inspected and policed for the removal of debris on a daily basis. Shrubbery shall be trimmed seasonally and grass areas mowed by the maintenance staff weekly during the growing season.

(g) Cleaning of Common Areas.

Common areas should be inspected and cleaned on a daily basis. The frequency and extent of cleaning of specific areas is indicated in item V.5(a) above.

(h) Reports on Minor Repair Needs.

Through prompt attention to minor repairs in individual units, more serious and expensive maintenance problems can be averted. Minor repairs result from damages and/or breakdowns in systems that are beyond normal tenant repair capabilities and require the services of the maintenance staff. Repairs that require the services of an outside firm because of the complexity of the problem and

possible residual effect of the damages or breakdown upon other areas of the building or systems within it, shall be generally defined as major.

Within this context, an inefficient reporting system is one of the primary causes of tenant inability to obtain required assistance. The following outline is the procedure to be observed to assure proper service to tenant repair needs.

- At initial move-in, each resident will be instructed as to the normal operations of apartment equipment and a method for remedying simple problems. This orientation will include instructions on how to request repair services. The procedure will also be described within the Resident Handbook to be furnished to each resident at move-in. The resident will be encouraged to request assistance whenever there is a problem with any of the apartment appliances or fixtures.

- Repair service will be initiated by request in writing, in person or by telephone from tenant for service. The Management Office will normally be open from 8:00 a.m. to 5:00 p.m., Monday through Friday at which time the Property Manager will receive the request. After 5:00 p.m., on weekends and holidays, Management will utilize an answering service to refer emergency calls to the Maintenance Man and Property Manager. Routine maintenance calls will be held over to the next working day.

In either instance, the Management Office will complete a work order form (See Exhibit G) in triplicate for each maintenance request. The form completed in triplicate will indicate resident's name, the apartment number and specific description of the problem. The original copy of the work order will be distributed to a Maintenance Man and the pink copy will be retained by the Property Manager and the yellow copy by the Maintenance Man. At the same time that request is written on

a work order, the Property Manager will also record it in the Maintenance log book indicating work order number, tenant name, address, complaint, date and time of call. Once work is completed, Maintenance Man should get signature of tenant on work order. Maintenance Man will turn in work orders on a daily basis to Property Manager for his review who will mark down stock used and hours to complete the job. Property Manager will record in work log the work done, man assigned, length of time for completion and whether or not tenant signed work order. Property Manager will record the above information on the pink copy of the work order and file in tenant's file. The Maintenance Man will match up the original and yellow copies of the work orders when completed and file in a building file.

- All service requested must be received in the Management Office by 8:30 a.m. in order that they may be reviewed by the Property Manager and Maintenance Man for inclusion in the day's work schedule. Delivery of services will be given on a priority basis, based upon the order of receipt of the request and the apparent urgency of need. However, it is the goal of TSI to service all maintenance requests within 48 hours of request.

- The Maintenance Man will assign repairs to appropriate personnel, indicating the order in which they are to be completed. Until the system is perfected, all service calls must be completed within a single day. In the [illegible] the Maintenance Man will incorporate unserviced or uncompleted work into the next day's work schedule. Again, priorities will be established as to the order of repairs, with the previous day's work generally given first priority.

- Repairs will be performed when a tenant is not at home, if such authority is indicated on the request form. If not, Maintenance will leave a note and notify tenant to call office when they will be home. (See Exhibit H).

- Depending upon the extent of service requests, repairs may be made on Saturday mornings. Generally, all service requests will be performed during the normal work day. Only emergency situations will be attended after 5:00 p.m. and after 12:00 noon on Saturdays and Sundays.

(i) Maintenance Performance

In addition to the above-mentioned reporting system, Management has developed several methods to monitor maintenance performance:

- Weekly Maintenance Telephone Survey of residents who have had work done in their apartments (See Exhibit I).

- Review of Maintenance Response Time in monthly indices (See Exhibit A).

- Monthly interview with tenant regarding maintenance and janitorial delivery systems (Exhibit A).

VI. RENT COLLECTION POLICIES AND PROCEDURES.

A. On-Site Collections

Payments will be accepted at the site office or by mail. Cash payments will not be accepted and there will be no attended after-hours depository.

B. Partial Payments or Pre-Payments.

Rent will be due on the first of each month and prepayments will be accepted if offered by any resident. Full payments will be strongely encouraged to simplify the work of the Accounting Department in the monitoring of rent collections. However, partial payments will be accepted as a response to the financial limitations of some of the residents.

C. Late Fees.

No late fees will be charged on delinquencies.

D. Missed Payments.

If a rent payment is not made within the first five days of the month, the Property Manager will contact the resident by telephone or by dunning letter. If payment is not made by the ninth of the month, the Property Manager will initiate eviction proceedings against the resident. During this period, the Property Manager will attempt to work out the financial problems of the resident with him.

E. Financial Referral Services.

If required, the Property Manager will refer the resident to a financial counselor or social worker to assist the resident with his budgetary problems.

F. Eviction Policies and Procedures.

If full payment is not made by the twelfth of the month by delinquent tenant, Management will start eviction proceedings immediately.

Residents will be expected to abide by terms of their lease. Residents will first be notified in writing by the Property Manager of any lease violation. If non-compliance persists, Management will initiate legal action against lease violators.

G. Recording of Rent Payments

All rent checks and security deposit payments will be made at the site office of the development. The Property Manager will be responsible for recording and depositing rent checks in a local bank. Rent payments will be kept in a separately-titled account. Security deposits will be maintained in accordance with Massachusetts state law. The Property Manager must deposit the amount of each security deposit in that account within thirty (30) days after he receives it. Copies of all deposits and checks will be forwarded daily to the Central Office for recording purposes.

VII. PROGRAM FOR MAINTAINING ADEQUATE ACCOUNTING RECORDS AND HANDLING NECESSARY FORMS AND VOUCHERS.

A. Accounting and Purchasing Procedures.

The accounting and purchasing procedures of TSI are consistent with the HUD handbook of FHA requirements

governing fiscal operations, accounting and financial reports for multifamily projects. (Form #2410).

B. Reporting Requirements.

HUD Forms 93479, 93480, 93481 will be prepared on a monthly basis by the Accounting Department. The Controller is responsible for day-to-day operations of the accounting. Moreover, this system has been computerized so that monthly income and expense statements, balance sheets and rent statements are available in a timely fashion.

C. Tenant Certifications and Recertifications.

Prior to a resident moving into his apartment, all required certifications must be completed. The certifications are then filed in a special folder kept for each resident. Recertifications will be the responsibility of the Property Manager and these will also be kept in the resident file.

D. Monitoring of Project's Cash Flow.

The current accounting system employed by TSI provides a monthly income and expense statement which allows the Manager and the Sponsor to easily monitor the cash flow.

E. Monthly Accounting Report.

During rent-up and subsequent to the rent-up, the Sponsor and the HUD office will receive the monthly accounting report by the fifteenth day of the month.

VIII. PLANS FOR TENANT/MANAGEMENT RELATIONS.

A. Procedures for the Handling of Tenant Grievances.

As outlined in the Staffing Section of the Management Plan, there will be a substantial number of management employees--Manager, Maintenance Man and Janitors-- to handle the day-to-day problems of the resident. It is hoped that the services that this staff will provide will result in a minimum of grievances. However, it will be the responsibility of the Property Manager to handle any tenant grievance. In addition, there will be a representative committee of the residents which will meet with the Property Manager on a monthly basis. At this time, specific grievances can also be raised.

The Owner will attend some of these meetings. In addition, it will be the responsibility of the Property Manager to notify the Sponsor/Owner of any significant grievances that may require his attention.

B. Servicing of Tenant Requests.

All tenant requests will be submitted to the Property Manager who will be responsible for delegating this work to appropriate individual, i.e., the Resident Superintendent or the janitors.

Tenant requests will be closely monitored by the Property Resident Manager to insure that the requests are processed expeditiously.

C. Tenant Orientation.

Prior to moving in, all tenants will be oriented to the project to insure their familiarity with the equipment included in these units, the equipment available in the building and the various services the development offers.

D. Leasing Policies and Procedures.

Leasing policies and procedures shall reflect responsibilities of the Sponsor as described in the Regulatory Agreement, FHA Form No. 2466 and is identified in the FHA "Model Form of Section 8 Lease under Section 221(d)(4)". These leases will require minor modification to reflect specific requirements of the Sponsor and local practices.

E. Leases in Foreign Languages.

The majority of potential tenants who are expected to apply will be English-speaking. However, we do anticipate some Spanish-speaking to apply. We will have the standard lease form in both English and Spanish. A bi-lingual staff person will be available to review lease provisions with Spanish-speaking residents.

Some latitude may be required in the interpretation of lease provisions to achieve the objectives of the Sponsor and tenant alike. This shall be achieved through the adoption of policies and procedures that reflect awareness of potential tenant problems and a willingness to work with the tenant in resolving these problems. Strict interpretation of the lease shall only be applied where tenant willfully violates his

responsibilities, where the tenant's circumstances are beyond resolution and additional consideration would be unfair to other tenants, or where as a result of liberal interpretation of the lease the Sponsor's actions would conflict with his responsibilities as outlined in the Regulatory Agreement.

F. Copy of Proposed Lease.

A copy of the proposed lease has been attached for review and approval (See Exhibit J).

G. Cooperation with Tenant's Organization.

In the past, TSI has fostered tenant organizations within all of its developments. Tenant Services, Inc. believes that having such organizations results in better management-tenant relations.

H. Support and Participation of Tenants.

The managing agent will enlist tenant support and participation in a manner similar to past efforts; namely, by organizing tenant meetings, by reinforcing tenant feedback, by maintaining courteous staff/tenant relations and by periodic newsletters.

IX. SOCIAL SERVICE PROGRAM.

A. Social/Referral Services.

The Property Manager will be responsible for developing and maintaining a current, city-wide listing of available social services to accomodate the needs of the tenant population.

B. Social, Recreational and Education Services.

The management staff in conjunction with a resident committee will be responsible for developing a comprehensive sovial, recreational and educational program that will draw on the resources of the development as well as those of the surrounding area. Local community resources include public libraries, museums, events at public recreation areas, to name a few.

C. Counseling Services.

The management staff of the development will provide informal and formal financial and social counseling for the residents, both during and after relocation. More importantly, they will provide a link with government agencies and those professional services that the residents may require during the relocation period and for new tenants thereafter (e.g., legal, social, psychiatric, etc.).

D. Security.

Considerable time will be spent at tenant orientation discussing tenant and management responsibility regarding security. The Property Manager will establish and maintain a direct line of communication with the local police. This will facilitate police cooperation, should there be any security problems.

X. MANAGEMENT AGREEMENT.

The Standard Section 8, 221(d)(3) Management Agreement form will be used.

EXHIBIT A

INDICES

Project _____

Long Term GOAL						
4.5	Building Exterior					
4.5	Building Interior					
	Budget vs. Profit Loss					
95%	Collections vs. Charges					
3	# Tenants Owing 4 + Payments					
30	Payables Paper Flow Period					
5	Number of Vacancies					
30	Vacancy Period					
10%	Tenant Selection					
2	Maint. Response Time					
	Break-Ins					
	No Heat					
	Turnover - Moveouts					
	Evictions					
	Survey - Maint.					
	Genl.					

MONTHLY JANITORIAL & MAINTENANCE REPORT

BERGEN CIRCLE
GIRARD AVE
Development Name

Tenant Name/Address SARAH WIGFALL Apt # Tel 737-0925 Date 1/4/70
HANDICAP 15 GIRARD AVE SPRINGFIELD By

Are you satisfied with the janitorial and maintenance service?	FINE
Are the corridors, stairs & hallways clean?	FINE
Are the corridors properly lit?	FINE
Is the laundry area clean?	
Are the TSI employees courteous?	
a Janitors?	GENERALLY
b. Maintenance Staff?	
c Property Manager?	
When problems arise, are they resolved promptly?	N/A
Are your windows & locks secure?	FINE
Does the intercom & v surveillance system function properly?	FINE
Are there problems with vermin?	NO LONGER
Are there electrical problems?	NONE
Are there problems in public halls?	

Are there plumbing problems? 1 Dripping Water? 2 Toilet/Tub? 3. Kitchen Sink/Disposal?	NONE	
Any problems with doors/windows?	—	
Are there problems in the front/back yards?	N/A	
Are there problems in the trash/dumpster area?	N/A	
Are there problems with the trash collection day(s)	N/A	
Are there problems with the neighbors?	NO	
Any other problems?	SATISFIED	

MANAGEMENT PLAN

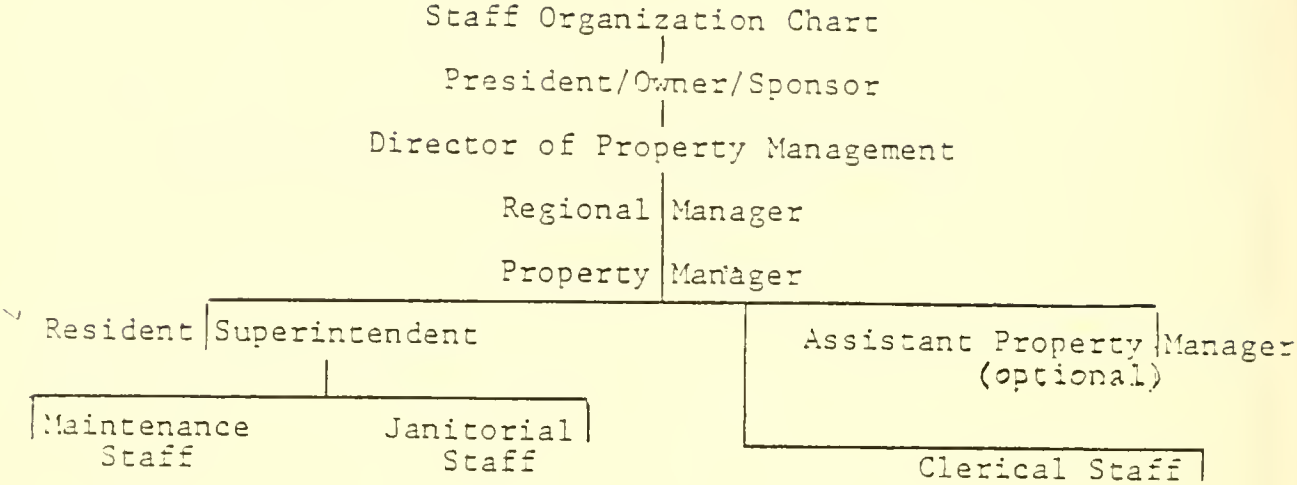
EXHIBIT B

RACIAL COMPOSITION OF TENANT SERVICES, INC.

I.	Professional	Black	White	Spanish
	M	4	1	
	F	6	3	
II.	Other			
	M	24	2	7
	F	7	2	

EXHIBIT B

Staff Organization Chart



Supervisory Relationships

Tenant Services, Inc. (TSI) shall, except as outlined below, be responsible for the day-to-day operation of the project. It is contemplated that the staff of the development will be responsible to the Property Manager. The Property Manager, in turn, will be accountable to the Regional Property Manager of TSI whose immediate supervisor is the Director of TSI. In turn, TSI answers to the owners, Housing Innovations, Inc.

MANAGEMENT PLAN

EXHIBIT C

PROPERTY MANAGER DUTIES

a. Tenant selection;

b. The leasing of new and turnover apartments;

c. The collection of rent, including the issuance of legal late rent notices and their follow-up in case of non-payment of rent;

d. Maintaining full occupancy of the development with less than five per cent loss of revenue due to unrented space after moveouts or to collection losses from nonpayment of rent;

e. The development of janitorial personnel to assure proper cleanliness and maintenance of common spaces, sidewalks, parking lots and grounds;

f. The acceptance of work or service requests for repairs and maintenance of apartments, common spaces, structures and grounds;

g. The assignment of work orders to the maintenance personnel, including follow-up to insure proper completion in a reasonable length of time;

h. The frequent inspection of grounds, parking lots, common spaces and apartments for proper cleanliness and maintenance;

i. With Owner approval, the negotiation and supervision of all necessary maintenance contracts;

j. The purchase, after competitive pricing, of all materials and supplies necessary for the project on a purchase order form approved by the Owner;

k. The maintenance and security of a small inventory of supplies necessary for regular operation;

l. Keeping an inventory of all capital and noncapital items of personal property, with a description of their value and condition (this will include all ranges and refrigerators with their location and serial number as well as all other equipment, including everything from a tractor to hoses and sprinklers used for watering, but will not include replacement items, such as glass, lightbulbs, etc.);

m. Setting up and maintaining on an accrual basis a bookkeeping system that includes a journal, a ledger and a rent roll control system. The accounting system should meet HUD requirements;

n. The development of yearly operating budget;

o. The annual inspection of structures, grounds and apartments for necessary repairs, preventive maintenance and housekeeping evaluation;

p. The prompt monthly preparation and forwarding of all forms required by HUD to the _____ HUD office;

q. The preparation within the 60-day time limit of the annual survey;

r. The annual and bi-annual verification and certification of income for Section 8 and regular tenants according to their move-in date and date of their lease; and

s. The creation of a program, through the tenant organization and the owner, to insure maximum tenant cooperation by promoting community programs for adults and children; community standards for conduct, housekeeping and property maintenance; tenant complaint procedures; and maximum utilization of community resources such as welfare, social services, schools, police and other agencies.

MANAGEMENT PLAN

EXHIBIT C

JANITOR

JOB DESCRIPTION

- Report to the site office daily at 8:00 a.m.
- Report any problems, damage to the property, etc. to the Property Manager.
- Complete janitorial work log on a daily basis and submit to the Property Manager.
- Sweep and mop landings, stairwells daily as needed.
- Sweep sidewalks and gutters around buildings daily.
- Sweep out parking lots as needed.
- Remove all marks and dirt from all corridor walls daily.
- Remove all marks and dirt from all community/laundry room walls as needed.
- Dust window sills and bannisters in corridors, stairwells and laundry rooms daily.
- Dust and wash interior and exterior light fixtures as needed.
- Replace bulbs throughout as per established lightbulbing schedule.
- Sweep and mop laundry room as neede.
- Empty barrels from laundry room and exterior grounds as needed.
- Clean washers and dryers daily.

MANAGEMENT PLAN

EXHIBIT C

MAINTENANCE MAN

JOB DESCRIPTION

- Report to site office daily at 8:00 a.m.
- Complete work orders within twenty-four hours of assignment.
- Maintain maintenance log on a daily basis and submit to Property Manager.
- Assist in upkeep of storage area and of maintenance supply inventory.
- Report any problems, damage to the property, etc. to the Property Manager.
- Assist the Property Manager in developing and maintaining a preventive maintenance program.
- Respond courteously and efficiently to all regular requests for service within 48 hours, and to emergency requests immediately.
- Be on call for emergencies on evenings and weekends as per schedule approved by Property Manager.
- Adhere to all general administrative policies of Tenant Services, Inc.
- Perform any other assigned duties to assure the smooth operation of the development.

MANAGEMENT PLAN

EXHIBIT D

SAMPLE LETTER TO LOCAL BUSINESSES AND EMPLOYERS

Dear Sir/Madame:

_____ Apartments has a set goal to establish a resident community that will reflect enthnically and economically New York's general population.

The enclosed brochure will describe _____ Apartments and give you a glimpse of the development. Typical floor plans and rent schedules are included. Two and three bedroom apartments are still available with an early 1979 occupancy date. We need your assistance in reaching your employees and co-workers.

If you should wish materials for distribution, please contact me. I am available to meet with you at your convenience. Applications can be obtained at our Rental Office, _____ Street, New York. Office hours are 10:00 a.m. to 7:00 p.m., Monday through Friday.

Thank you for your assistance.

Yours truly,

TENANT SERVICES, INC.

Property Manager

Enclosures

MANAGEMENT PLAN

EXHIBIT E

RESIDENT HANDBOOK

Tenant Services Inc.

MANAGEMENT PLAN

EXHIBIT F

SAMPLE ORIENTATION PACKAGE

Tenant Services Inc.

WHAT IS A HOME?

We who have a home,
Have treasures to behold
A workshop to be proud of
When days are sad and cold.

All the profit and the pleasure
And happiness combined
The rarest gift of all I find
Is home and peace of mind.

Erma Randall

INFORMATION ON

MAKING MOVING EASIER

Check to see if you have taken care of these details ahead of time in order to make moving easier.

__Electric Company

__Gas company

__Telephone company

__Water company

__Board of Elections (voter registration card)

__Depart. of Public Welfare

__Draft Board

__Medicaid

__Medicare

__Motor Vehicle Bureau (driver license, car registration)

__Post Office (get change-of-address cards from mailman)

__Schools

__Social Security Office (social security check

__Banks

__Doctor

__Insurance companies

__Credit card accounts

__Milkman

__Newspaper and magazine subscriptions

__Put important papers where you can find them easily on moving day.

__Check insurance to see if it covers damage to your belongings during move.

__If you have a TV antenna, remember to take it down.

__Be sure rugs, curtains and clothes are clean before you move.

__Collect plastic bags, boxes and crates that you will need for packing.

Tenant Services Inc.
An Affiliate of Housing Innovations Inc
50 FRANKLIN STREET · BOSTON MASSACHUSETTS 02110
426-5266

SECURITY REMINDER

HAVE YOU INSURED YOUR PERSONAL BELONGINGS AGAINST THEFT YET?

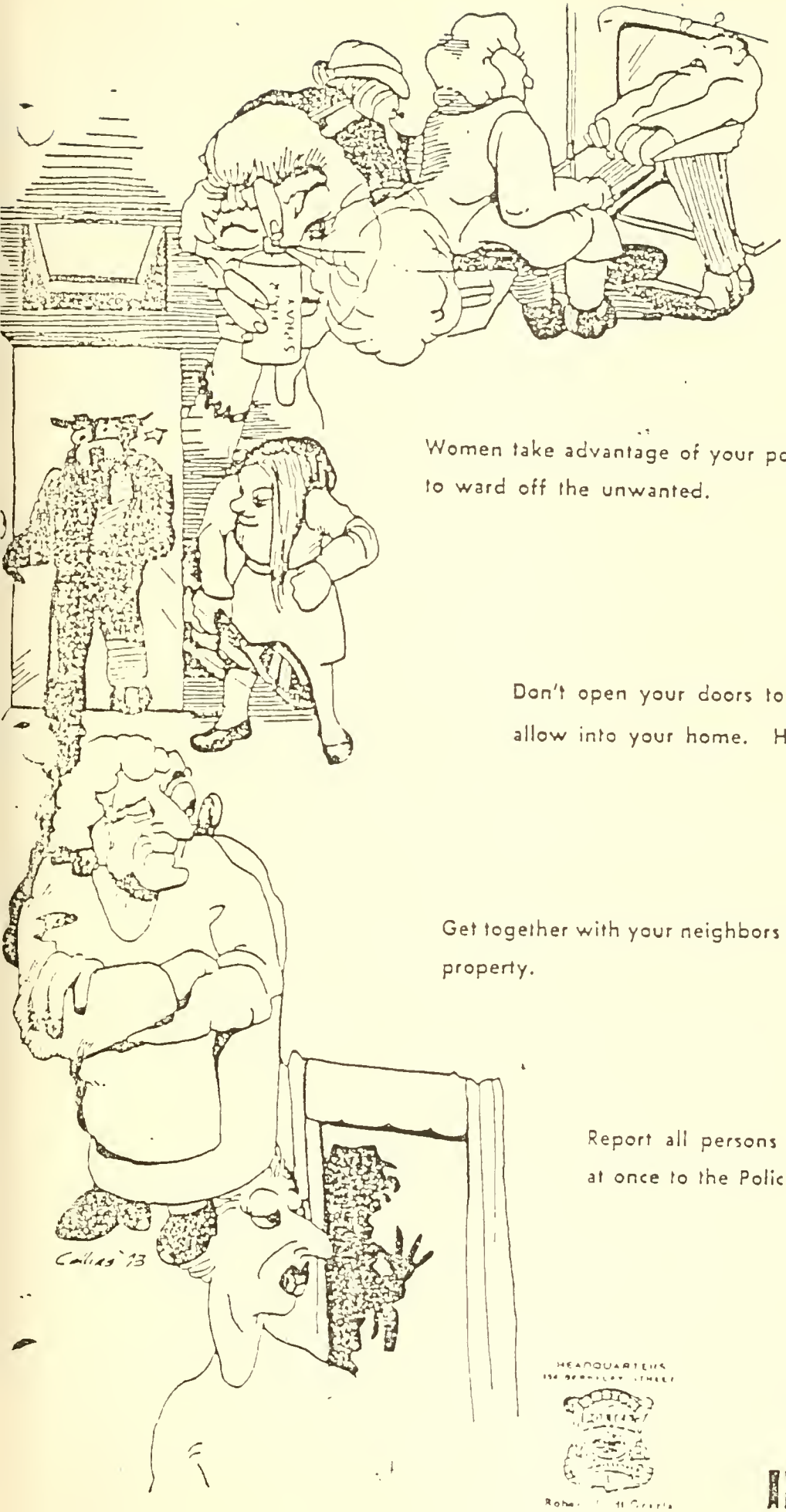
FEDERAL CRIME INSURANCE CAN BE PURCHASED
AT MINIMAL COST FROM:

UNITED BROKERS INSURANCE AGENCY

DON'T WAIT UNTIL IT'S TOO LATE

SECURITY IS THE JOINT RESPONSIBILITY OF MANAGEMENT and RESIDENTS.

Property Management



Always carry your purse close your body and keep a firm gr on the latch.

Women take advantage of your possessions, they may come in hand to ward off the unwanted.

Don't open your doors to strangers; be certain of whom yo allow into your home. Have a peephole device installed.

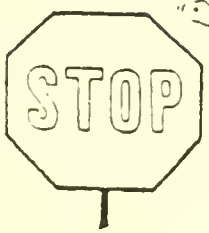
Get together with your neighbors and keep an eye out for one another property.

Report all persons or automobiles of suspicious natu at once to the Police. Dail 911

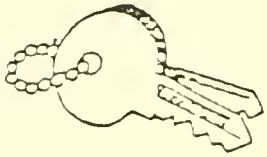
COURTESY OF
CRIME PREVENTION SECTION

Boston Police

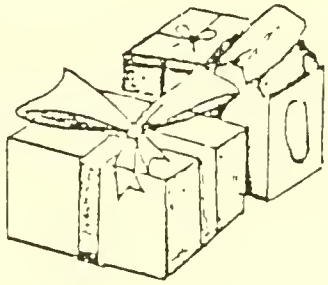
MR. DRIVER:



Take Your



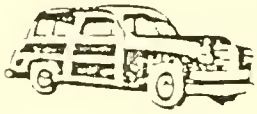
Put



In The Trunk

Or Cover Them

LOCK YOUR



Please Help Us

To Protect Your Property

COURTESY OF
CRIME PREVENTION SECTION

HEADQUARTERS
154 BERKELEY STREET

Robert J. di Grazia
Police Commissioner

Boston Police

FEDERAL CRIME INSURANCE PROGRAM

COMMERCIAL AND RESIDENTIAL POLICIES

AVAILABLE NOW AT REDUCED RATES
THROUGH ANY LICENSED PROPERTY INSURANCE AGENT OR BROKER

- Commercial Crime Insurance Policies —

  To protect your business against loss for up to $15,000 with a choice of the following coverages:

  Option 1: Burglary, safe burglary, robbery inside and away from the premises and resulting damage to the premises.

  Option 2: Robbery only, inside and away from the premises, and resulting damage to the premises

  Option 3: Burglary and safe burglary only and resulting damage to the premises

  Option 4: Same coverages as in Option 1 but in varying amounts.

- Residential Crime Insurance Policy —

  To protect you against loss for up to $10,000 resulting from robbery or burglary of your home or apartment.

WHO IS ELIGIBLE?

- Now you can obtain affordable crime insurance from the Federal Insurance Administration of the United States Government that won't be cancelled or not renewed because of losses, if you live in:

  Connecticut, Illinois, Maryland, Massachusetts, Missouri, New York, Ohio, Pennsylvania, Rhode Island, Tennessee, or the District of Columbia.

HOW DO YOU BUY IT?

- Any licensed property insurance agent or broker in the above States and the District of Columbia can help you submit an application. Applications may also be obtained directly from the Servicing Company for your State:

  For Connecticut, District of Columbia, Massachusetts, Missouri, New York, and Ohio — Aetna Casualty & Surety Company.

  For Illinois, Maryland, Pennsylvania, and Tennessee — Insurance Company of North America

  For Rhode Island — American Universal Insurance Company.

HOW MUCH DOES IT COST? — PREMIUMS ARE PAYABLE SEMI-ANNUALLY

- Residential crime insurance annual premiums vary according to crime rates in the city or town where you live:

	Annual Rates		
Coverage	Minimum	Average	Maximum
$1,000	$20	$30	$40
$3,000	$30	$50	$50
$5,000	$40	$50	$60
$7,000	$50	$60	$70
$10,000	$60	$70	$80

- Commercial crime insurance annual premiums vary according to class of business, city or town you live in, and annual amount of gross receipts.

For example:
For a drug store in Boston, Chicago, Cleveland, Hartford, Memphis, Philadelphia, Providence or St. Louis, the annual premium (payable in semi-annual instalments) is

	With annual gross receipts of:		
	Under	$ 10,000-	$300,000-
Coverage	$100,000	$299,999	$499,999
Robbery insurance only (Option 2)			
$1,000	$ 60	$ 90	$120
$5,000	240	300	480
Burglary insurance only (Option 3):			
$1,000	$ 50	$ 75	$100
$5,000	200	300	400
Burglary and robbery insurance combined in equal amounts (Option 1):			
$1,000	$100	$150	$200
$5,000	400	600	800

Option 4: Insureds also may elect combinations such as $5,000 burglary and $1,000 robbery at rates of $280 $300 $320

INFORMATION SOURCE
Federal Insurance Administration
U.S. Department of Housing and Urban Development
451 - 7th St., S.W., Washington, D.C. 20410
Phone (202) 755-6555

Reproduced as a public service by the

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AUGUST 1972

Tenant Services Inc.
An Affiliate of Housing Innovations Inc

50 FRANKLIN STREET · BOSTON MASSACHUSETTS. 02110 426-5266

NOTICE OF TENANT CHARGES

Reference: Breakage

Due to the high costs of maintenance and repairs, residents will be charged (in part or full) for the repair, replacement, or mending of the items listed below if due to the negligence of residents, relatives, or quests. The charge for each item will depend upon cost and labor to repair the breakage.

Replacements	Charge		
Apartment door locks	$15.00		
Mailbox locks	$15.00		
Windows	*cost	plus	labor
Screens	*cost	plus	labor
Apartment door (negligence)	*cost	plus	labor
Wall repairs	*cost	plus	labor
Damaged garbage disposals	*cost	plus	labor
Stopped up toilets (negligence)	*cost	plus	labor
All other breakage as a result of tenant negligence.	*cost	plus	labor

*All cost plus labor charges will be reviewed by the Manager to insure the appropriate charges.

THE MANAGEMENT

Property Management

Tenant Services Inc.
An Affiliate of Housing Innovations Inc

50 FRANKLIN STREET · BOSTON MASSACHUSETTS 02110 426-5266

NOTICE OF TENANT CHARGES

Reference: Lock-Outs

Residents will be charged according to the list below in regard to Tenant Lock-Outs:

Days	Hours	Charge
Mondays thru Fridays	8:00 a.m. - 4:00 p.m.	$1.00 per lock-out
Mondays thru Fridays	4:01 p.m. - 10:00 p.m.	$5.00 per lock-out
Mondays thru Fridays	10:01 p.m. - 7:59 a.m.	$10.00 per lock-out
Saturdays, Sundays and Holidays	8:00 a.m. - 10:00 p.m.	$5.00 per lock-out
Saturdays, Sundays and Holidays	10:01 p.m. - 7:59 a.m.	$10.00 per lock-out

CARRY YOUR KEYS AT ALL TIMES

THE MANAGEMENT

Property Management

MEMORANDUM

TO: All Residents

FR: Management

RE: Holiday Security Measures

DT:

The Holiday season is approaching. Protect your apartment and valuables.

WHAT CAN YOU DO?

Engrave all appliances and belongings. Register with the police department (Tenant Services, Inc. has form and engravers). Display Ident - I - Guard decals on door and or windows. Decals will be issued upon return of engravers.

SAFE DEPOSIT BOX

Do not leave CASH, valuable jewelry or coins in your apartment. Rent a safe deposit box for a few dollars a year at any bank of your choice.

STORAGE

Store your furs. Pick them up when you wish to wear them, return them to storage after use. The rental cost you won't miss. The furs you will.

GIFTS

Change gift buying habits for those expensive Christmas gifts. Purchase gift certificates which can be purchased a few days before Christmas and hand delivered to relatives and friends.

INSURANCE

Purchase Federal Crime Insurance or Homeowner Insurance NOW.

Talk with neighbors and set up a building or apartment watch shifts. Form a mail committee of 2 or more persons to meet the postman and collect mail. Make arrangements with your individual postman.

ALERT

Call police immediately if you suspect a break in is in process or suspicious persons are on or around the premises.

Tenant Services Inc.

Do not open your apartment door for SALESMAN or STRANGERS.

WHAT CAN TENANT SERVICES, INC. DO?

Secure Entrances and Exits
Keep all entrance doors repaired and LOCKED
Keep all intercoms & buzzers functioning

Secure basement doors, windows and install mesh wire over first floor windows inside and outside where requested. Install metal plates on exterior basement doors. Install 6" heavy duty slide bolts for rear apartment doors.

CALL AHEAD

From November ___ - January __ you will receive a call to announce repairman coming.

APARTMENT & BUILDING REPAIRS

Residents will be notified of approximate time repairman will come. Each building should select one or two people to be alerted when workman will be in basement and public areas.

VACANCIES

Secure all vacant apartments while redecorating is in process. Re-occupy as soon as possible after apartment is ready for use.

LISTINGS & DIRECTORIES

Provide complete name listings on buzzers and mailboxes.

Tenant Services, Inc. will spend the next week going from building to building providing "What We Can Do" When are you going to start doing what you can do?

Tenant Services Inc.

MANAGEMENT PLAN

EXHIBIT G

SAMPLE WORK ORDER

TENANT SERVICES, INC.

50 FRANKLIN ST., BOSTON, MASSACHUSETTS
BOSTON 426-5266 • ROXBURY 427-4100

0083

ADDRESS APT. NO. PHONE

NAME

COMPLAINT

DATE	TIME	SERVICE	CHECK ONE			OPERATOR
			PHONE	LETTER	VERBAL	

SERVICE.

ANY FURTHER WORK? JOB STARTED COMPLETED

LABOR					STOCK		
NAME	DATES	TOTAL HOURS	AMOUNT			PURCHASE ORDER NO	COS

FILE COPY

TS-M102

MANAGEMENT PLAN

EXHIBIT H

SORRY - I MISSED YOU

IT WAS NECESSARY TO ENTER YOUR APARTMENT TODAY TO SERVICE CHECK OR REPAIR ITEM(S) CHECKED

___AIR CONDITIONING ___GAS RANGE

___DISHWASHER ___HEATING SYSTEM

___DISPOSAL ___PLUMBING SYSTEM

___ELECTRICAL SYSTEM ___OTHER

_____

DATE _____ TIME _____

WORK COMPLETED YES _____ NO _____

REMARKS _____

_____

_____

SIGNED _____
TENANT SERVICES INC.

MOORE BUSINESS FORMS INC. TSI-M100

SIGNED _____
TENANT SERVICES, INC.

MOORE BUSINESS FORMS INC. TSI M100

MANAGEMENT PLAN

EXHIBIT I

MAINTENANCE TELEPHONE SURVEY

COPIES TO: MTA, MAB, RVD, PAP, CFR, TSM, LCC, LEG, SC, OQ, DW, TJ, CHRON

W.O.'s SENT		W.O.'s RECEIVED	
ROXBURY	38	ROXBURY	68
F.P.A.	15	F.P.A.	24

TOTAL COMPLAINTS---------- 53

MAINTENANCE TELEPHONE SURVEY

Week of April 9, 1979

TENANT'S NAME	ADDRESS	W.O.# PHONE #	COMPLAINT	W.O. REC'D	SIGNED BY: ASSIGNED TO:	W.O. COMPLT.'D	RESPONSE TIME	MEN'S BEHAVIOR	TENANT'S COMMENTS
ELOISE YOUNG	19 Normandy St. #2	#025605 445-4865	Buzzer doesn't work on entrance door-check to see if door locks	4/6/79	not signed Johnnie	4/5/79	one day	Satisfactory	Satisfactory wo
HORACE KINCAIDE	181 Magnolia St #1	#021126 427-4741	Bathtub leaks	3/29/79	not signed Alvin	3/28/79	one day	Very Nice	Good Work
SHARON SHEPHERD	44 Whitfield St. #20	#021249 265-0747	Broken Storm Window	4/3/79	not signed Buster	4/2/79	12 days job started on 3/19/79	Excellent	Satisfactory Very good work
MRS. MCTAGGART	140 Crawford St. #1	#025603 445-6683	replace top lock on front door	4/11/79	not signed Buster	4/6/79	two days	Good	Very good work
DOROTHY PERRY	237 Quincy St. #1	#021059 427-6366	Oven smoking	4/4/79	not signed Greene (appl. service man)	not indicated	W.O. sent on 3/19/79 job started 3/20/79	Good	Everything is c
DORLEN HICKS	36 Cunningham St #1	#021119 427-2430	Garbage Disposal out of order	4/2/79	Tenant signed Alvin	3/28/79	one day	Good	Satisfactory w
KENNETH BUDD	78 Intervale St. #3	#021125 427-4741	needs plastering work done	4/2/79	Tenant signed John R.	3/29/79	one day	Very good	Very Good work Tenant very pleased

MANAGEMENT PLAN

EXHIBIT J

SECTION 8 LEASE

S E C T I O N 8 L E A S E

FOR USE UNDER SECTION _____
(other than Section 221d3)

PROJECT _____

_____

This Agreement made and entered into this _____ day of _____, _____, between _____, as LANDLORD, and _____ _____ as TENANT.

WITNESSETH:

WHEREAS, the LANDLORD is the Mortgagor on a mortgage covering the project in which the hereinafter described unit is situate, which mortgage is insured under Section _____ of the National Housing Act, as amended; and,

WHEREAS, pursuant to a Regulatory Agreement between the LANDLORD and the Secretary, the LANDLORD has established a basic rental schedule and a fair market schedule for each unit in the project, which schedules have been approved by the Commissioner and,

WHEREAS, pursuant to said Regulatory Agreement, the LANDLORD has agreed (1) that the rental charged for the unit hereinafter described shall be the basic rental or 25% of TENANT'S income whichever is greater, but in any event not to exceed the fair market rental and (2) that a recertification of the TENANT'S income will be obtained at intervals required by the Federal Housing Commissioner and that the rental charged shall be adjusted by the LANDLORD to reflect income changes shown by the recertifications; and,

NOW THEREFORE,

1. The LANDLORD leases to the TENANT and TENANT leases from the LANDLORD dwelling unit _____ in the project known as _____ for the term commencing on the _____ day of _____, 19____ and ending on the _____ day of _____, 19____ at a monthly rental of $_____, subject to adjustment as hereinafter provided.

2. The monthly rental, stipulated herein, shall include the costs of all hot and cold water, janitor service, electric current, gas and heat (all of which utilities LANDLORD covenants and agrees to furnish to the TENANT at reasonable times and in reasonable amount).

3. Said rent shall be payable monthly in advance on or before the first calendar day of each month at _____ to LANDLORD or to such other person or persons as the LANDLORD from time to time by written notice designates.

4. UNLESS TERMINATED AS PROVIDED HEREIN, THIS LEASE SHALL BE AUTOMATICALLY RENEWED FOR SUCCESSIVE TERMS OF ONE MONTH EACH AT THE AFORESAID RENTAL, SUBJECT TO ADJUSTMENT AS HEREIN PROVIDED, PAYABLE IN ADVANCE WITHOUT REFUND ON THE FIRST DAY OF EACH MONTH. EITHER PARTY MAY TERMINATE THIS LEASE AT THE END OF THE INITIAL TERM OR ANY SUCCESSIVE TERM BY GIVING 30 DAYS WRITTEN NOTICE IN ADVANCE TO THE OTHER PARTY.

_____ (TENANT) _____ (TENANT)

5. TENANT agrees that the family income, family composition and other eligibil requirements shall be deemed substantial and material obligations of his tenancy with respect to the amount of rental he will be obligated to pay and his right of occupancy.

6. TENANT agrees that a recertification of income shall be made to the LANDLORD at least every year from the date of this lease; provided, however, that in any event, TENANT shall recertify his income upon the execution of any subsequent lease of the aforesaid premises.

7. TENANT agrees that the monthly rental payment is subject to adjustment by th LANDLORD to reflect income changes which are disclosed on any of TENANT'S recertifications and TENANT agrees to be bound by such adjustment. LANDLORD agrees to give thirty days written notice of any such adjustment to the TENA by an addendum to be made a part of this lease, stating the amount of the adjusted monthly rental which the TENANT will be required to pay.

8. LANDLORD and TENANT agree that, if upon recertification, 25% of TENANT'S income is sufficient to pay fair market rental, then TENANT'S rental shall be increased to the fair market rental of $_____ and TENANT shall no longer be required to make the income recertifications required by this lease.

9. The TENANT shall not assign this lease, sublet the premises, give accommodation to any roomers or lodgers, or permit the use of the premises for any purpose other than as a private dwelling solely for the TENANT and his family.

10. TENANT agrees to pay to the LANDLORD any rental which should have been paid but for (a) TENANT'S misrepresentation in his initial income certification or recertification, or in any other information furnished to the LANDLORD; or (b) TENANT'S failure to supply income recertifications when required or to supply information requested by the LANDLORD.

11. TENANT for himself and his heirs, executors and administrators agrees as follows:

    a. To pay the rent herein stated promptly when due, without any deductions whatsoever, and without any obligation on the part of the LANDLORD to make any demand for the same.

    b. To keep the premises in a clean and sanitary condition, and to comply with all laws, health and policy requirements with respect to said premises and appurtenances, and to save the LANDLORD harmless from all fines, penalties and costs for violations or noncompliances by TENANT with any of said laws, requirements, or regulations, and from all liability arising out of any such violations or noncompliance.

    c. Not to use premises for any purpose deemed hazardous by insurance companies carrying insurance thereon.

    d. That is any damage to the property shall be caused by his acts or neglect, the TENANT shall forthwith repair such damage at his own expense, and should the TENANT fail or refuse to make such repairs within a reasonable time after the occurrence of such damage, the LANDLORD may, at his option, make such repairs and charge the cost thereof to the TENANT, and the TENANT shall thereupon reimburse the LANDLORD for the total cost of damages so caused.

    e. To permit the LANDLORD, or his agents, or any representative of any holder of a mortgage on the property, or when authorized by the LANDLORD, the employees of any contractor, utility company, municipal agency or others, to enter the premises for the purpose of making reasonable inspections and repairs and replacements.

    f. Not to install a washing machine, dryer, air conditioning unit or any other major appliance in the apartment without the prior written approval of the LANDLORD.

g. To have no animals or pets of any kind on the premises, other than those expressly permitted in writing by the LANDLORD.

h. To permit the LANDLORD or his agents to bring unlawful detainer and any other appropriate legal action in the event of a breach or threatened breach by the TENANT of any of the covenants or provisions of this lease.

12. The TENANT, by the execution of this agreement, admits that the dwelling unit described herein has been inspected by him and meets with his approval. The TENANT acknowledges hereby that said premises have been satisfactorily completed, and that the LANDLORD will not be required to repaint, replaster, or otherwise perform any other work, labor, or service which it has already performed for the TENANT. The TENANT admits that the premises are in a tenantable condition, and agrees that at the end of the occupancy hereunder to deliver up and surrender said premises to the LANDLORD in as good condition as when received, reasonable wear and tear excepted.

13. No alteration, addition, or improvements shall be made in or to the premises without the prior consent of the LANDLORD in writing.

14. TENANT agrees not to waste utilities furnished by the LANDLORD; not to use utilities or equipment for any improper or unauthorized purpose; and not to place fixtures, signs, or fences in or about the premises without the prior permission of the LANDLORD in writing. If such permission is obtained, TENANT agrees, upon termination of the lease, to remove any fixtures, signs or fences, at the option of the LANDLORD, without damage to the premises.

15. TENANT hereby makes a deposit of one month's rental against any damage except reasonable wear done to the premises by the TENANT, his family guests, or agents; and agrees to pay when billed the full amount of any such damage in order that the deposit will remain intact. Upon termination of this Lease, the deposit is to be refunded to the TENANT or to be applied to any such damage or any rent delinquency.

16. This Agreement shall be subordinate in respect to any mortgages that are now on or that hereafter may be placed against said premises, and the recording of such mortgage or mortgages shall have preference and precedence and be superior and prior in lien to this Agreement, irrespective of the date of recording and the TENANT agrees to execute any such instrument without cost, which may be deemed necessary or desirable to further effect the subordination of this Agreement to any such mortgage or mortgages, and a refusal to execute such instrument shall entitle the LANDLORD, or the LANDLORD's assigns and legal representatives to the option of cancelling this Agreement without incurring any expense or damage and the term hereby granted is expressly limited accordingly.

17. Failure of the LANDLORD to insist upon the strict performance of the terms, covenants, agreements and conditions herein contained, or any of them, shall not constitute or be construed as a waiver or relinquishment of the LANDLORD'S right thereafter to enforce any such term, covenant, agreement, or condition, but the same shall continue in full force and effect.

18. In return for the TENANT'S continued fulfillment of the terms and conditions of this Agreement, the LANDLORD covenants that the TENANT may at all times while this Agreement remains in effect, have and enjoy for his sole use and benefit the property hereinabove described.

WITNESS:

_____ LANDLORD

_____ BY: _____

_____ _____ TENANT
Husband

_____ _____
Wife

ADDENDUM TO LEASE

The following additional Lease provisions are incorporated in full in the Lease between _____ (Lessor) and _____ (Lessee) for the following dwelling unit: _____.

In case of any conflict between these and any other provisions of the Lease, these provisions shall prevail.

a. The total rent shall be $_____ per month.

b. Of the total rent, $_____ shall be payable by or at the direction of the Department of Housing and Urban Development ("HUD") as housing assistance payments on behalf of the Lessee and $_____ shall be payable by the Lessee. These amounts shall be subject to change by reason of changes in the Lessee's family income, family composition, or extent of exceptional medical or other unusual expenses in accordance with HUD-established schedules and criteria; or by reason of adjustment by HUD, or the PHA, if appropriate, of any applicable Allowance for Utilities and Other Services. Any such change shall be effective as of the date stated in a notification to the Lessee.

c. The Lessor shall not discriminate against the Lessee in the provision of services, or in any other manner, on the grounds of race, color, creed, religion, sex, or national origin.

d. The Lessor shall provide the following services and maintenance:

Plans for Carrying an Effective Maintenance and Repair Program.

An overview of the maintenance program shall be prepared yearly by the Property Manager and reviewed for appropriate modifications and adjustments in order to make it responsive to specific needs of the project and otherwise responsive to limitations of the operational budget. The program will be designed to reflect consideration of three major areas-routine and preventive maintenance and repairs.

Routine maintenance is that level of maintenance performed on a regular basis (daily, weekly or as required) and is designed to achieve cleanliness and attractive conditions both within the buildings and on the grounds.

Preventive maintenance is that level of maintenance that is required to prevent more serious corrective actions through the undertaking of scheduled activities that will keep the item or system in good repair, i.e. the preventive maintenance of the mechanical systems (heating, water supply, elevator, etc.). Regular inspection of non-mechanical areas and the performance of basic repair shall be similarly undertaken to prevent the need for more extensive corrective actions at a future date.

Repairs are those actions that are either requested by the

tenant or observed by management in the course of apartment inspections of interior and exterior public areas and equipmer Also included in the latter are failures in mechanical systems or damages that have been sustained by the building, grounds or equipment. Repairs are of two levels - those which can be performed by on-staff personnel and those requiring outside services to bring the item back into good service or conditior Every reasonable effort shall be used to avoid the use of outside services in the interest of operational economics. Such will be accomplished by maintaining equipment in good condition through preventive maintenance scheduling; orientation of the tenants on the proper operations of mechanical and other items; and by the institution of training programs that will increase the skills of janitorial personnel to perform maintenance level duties.

To achieve the above objectives, the following maintenance schedule will be taken:

(1) Daily

(a) Clean exterior grounds

(b) Clean around dumpster areas

(c) Sweep and mop public landings on all floors of each building

(d) Sweep stairwells

(e) Sweep laundry rooms

(f) Police grounds and sitting areas for paper

and other debris.

(g) Sweep and dust management office.

(h) Empty public trash disposal cans.

(2) Twice Weekly

(a) Clean lint traps in laundry equipment.

(b) Mop laundry rooms.

(3) Weekly

(a) Remove graffitti from walls.

(b) Dust light fixtures.

(4) As Required

(a) Sweep community rooms on days following use; mop bi-weekly, unless required more frequently.

(b) Change light bulbs in public areas (indoor and out) on an established lightbulbing schedule.

(c) Dust walls and fixtures in public halls weekly.

(5) Semi-Annually/Annually

(a) Maintenance personnel will inspect and repair heating systems regularly.

(b) Circulating pumps will be oiled and forced hot water systems bled twice annually.

(c) Water pressure, temperature, heating assembly of the D.H.W. are checked annually and the heater tank will be drained.

(d) Similarly, the boiler and forced hot water will be annually checked and bled.

(e) The gas furnace will be checked and adjusted.

(6) Other Activities

(a) Perform apartment repairs as requested and assigned.

(b) Seasonal grounds maintenance (snow removal, lawn and shrubbery care).

(c) Maintenance of outdoor recreation equipment.

(d) Inspection of appliances (refrigerators and stoves).

(e) Installation and maintenance of air conditioni equipment per instructions.

(f) Instruct in operations of appliances.

(g) Assist in the cleaning of apartments related to tenant moves.

e above activities shall be performed under the general direction of the Maintenance Man. The latter shall assist in janitorial duties f two or three hours of each day, the balance of his time to be devot apartment and other repairs and maintenance of equipment systems as required. All maintenance personnel shall meet daily to discuss and coordinate the day's activities. A similar meeting shall be held between the Property Manager and Maintenance Man for purposes of coordination and to allow for the input of apartment repair requests into the daily maintenance schedule.

Inspection schedules shall be performed at two levels - those applying to public and supportive areas (halls, mechanical equipment and rooms

related thereto, grounds, etc.) and the individual apartments.

Apartment inspections shall be performed by the Property Manager on an annual basis (unless it becomes evident that more frequent inspections are in order). These inspections are designed to determine that the unit is being properly maintained and cleaned and that mechanical equipment is in good repair. Residents will receive notification and be at home during the inspection. In addition to checking for maintenance problems in the apartment that have not been called in by the resident, the Proper Manager will pay particular attention for the following:

a. Poor Housekeeping
b. Additional beds or persons in the apartment
c. Evidence of Pets
d. Waterbeds
e. Extra locks on doors
f. Washing machines or freezers
g. Paint jobs on walls

If any of the above problems are found, the resident is to be notified immediately that they are in violation of the lease agreement and situation must be resolved immediately. The Property Manager will alert the appropriate social service agency if the problem is strictly poor housekeeping. Follow up inspections will be made within one week of initial inspection. Pictures will be taken at the second inspection. If situation has not improved, Property Manager will take necessary action to

remedy the situation.

Inspection of non-residential areas shall be performed on two levels:

(1) The Property Manager and maintenance personnel will be trained to visually inspect all areas of the buildings and grounds while in the course of performing their normal duties on a day-to-day basis. Annually, all such areas should receive a more intensive inspection where each component of the building (bearing walls, roof, windows, fountains, etc.) and grounds will be examined against a check list of specific items. These latter inspections shall be performed by the Property Manager and maintenance person

(2) Scheduled inspections shall be made of mechanical syst in compliance with the instructions and warrantee certifi-a

(ii) <u>Inventory and Service of Mechanical Equipment and Appliances</u>

A file will be maintained on all appliances and mechanical equipment. Each file will identify the item by its model and serial number, the date of purchase and installation, the existence or expiration of warrantees, guarantees and service contracts and a record of the date and extent of repairs.

As indicated above, mechanical equipment serving total

project needs will be inspected routinely or in conformance with preventive maintenance schedules. Appliances will be inspected for condition and serviceability prior to installation within the units and during the course of the annual apartment inspection. As move-outs occur, the appliances in each apartment will be inspected to detect any damages or requirements for repair that would justify an assessment of appliances (refrigerators and stoves) to exceed the number of apartments so as to provide replacement units where appliances require removal for repair.

(iii) Inspection and Maintenance of Units Prior to Moveouts.

a. Tenants will be required to notify the management office of intention to move at least 15 days prior to the actual moving date by certified mail. The Property Manager will then notify tenant by certified mail of the time and date of inspection, which must be within 5 days or 5 days after tenant's move. The Property Manager and tenant will inspect the apartment together. If there is any damage to the apartment, Management may withhold portion of the security deposit to cover costs. However, the Property Manager must send the resident by first class mail to his last known address, a written list of the damages claimed, together with a statement of costs actual incurred. If Management fails to do so within 30 days after termination, Management loses the right to the

deposit to offset damages. These provisions are in accordance with Massachusetts state law on Security Deposit

b. It is the goal of Management for vacancy turnover to be within thirty days. Therefore, upon receipt of notification of the move, the Property Manager will examine a continually updated waiting list of prospective tenants and contact the applicant at the top of the list desiring an apartment of the size to be available. Administrative work necessary to a determination of eligibility shall be initiated.

c. Upon determining the eligibility of the prospective tenant, a formal offering of the apartment shall be made and, if accepted, a new lease executed. Applicable policies and procedures as regard occupancy in the project shall be reviewed with the tenant.

d. The move-in and move-out date(s) shall be coordinated through the management office and the Property Manager will be generally available on those dates to assist in making the moving procedure run smoothly.

(iv) <u>Schedule for Painting and Redecorating</u>.
Design of the structure and the use of material and finishes requiring m[illegible]nal maintenance is expected to

result in little need for exterior painting.

Exterior surfaces that are painted, will be closely inspected annually to determine the need for repainting and repair.

Similarly, surface finishes in public areas that are expected to have a high level of tenant traffic and use will be of a type that will require minimal need for painting, refinishing or replacement. A high level of routine maintenance (washing, dusting, spot removal, repair should also minimize the need for these drastic actions. Notwithstanding, ceilings and other areas where painting and redecorating is required, will be inspected and repainted every two years to maintain a fresh appearance.

The interior of each apartment will be repainted by Management's Owner every three years. The painting will be provided at no additional expense to the tenant from a standard selection of colors. Vacated apartments will be repainted prior to occupancy by the new tenant.

(v) Garbage and Trash Removal.

Dumpsters have been conveniently placed at several location on the development for trash removal by the residents. It will be the responsibility of each resident to remove trash

from the apartments to the dumpsters. If residents have large items that they would like removed, they will be requested to notify Management so that a special pick-up can be made. The Maintenance Man will monitor the emptying of the dumpsters by the dumpster company to assure that it is in accordance with contract (i.e. correct number of pick-ups per week).

(vi) Major Repairs

Through the provisions of a properly executed preventive maintenance program and immediate attention given to needed minor repairs, it is anticipated that major repairs will be minimized. Notwithstanding, where such cannot be avoided, the Maintenance Man will provide interim repairs where possible and determine the need for more extensive repairs by outside services. Depending upon the nature of the equipment or system, service contracts may be provided by appropriate firms. The objective, however, will be to minimize the need for outside services. This shall be accomplished through a continuous training program of all maintenance personn to improve the level of their skills and to provide them with a level of proficiency that will permit most repair by the maintenance staff.

(vii) Grounds Upkeep and Maintenance.

Outside areas should be inspected and policed for the removal of debris on a daily basis. Shrubbery shall be trimmed seasonally and grass areas mowed by the maintenance staff weekly during the growing season.

(viii) Cleaning of Common Areas.

Common areas should be inspected and cleaned on a daily basis. The frequency and extent of cleaning of specific areas is indicated in item 5a above.

(ix) Reports on Minor Repair Needs.

Throught prompt attention to minor repairs in individual units, more serious and expensive maintenance problems can be averted. Minor repairs result from damages and/or breakdowns in systems that are beyond normal tenant repair capabilities and require the services of the maintenance staff. Repairs that require the services of an outside firm because of the complexity of the problem and possible residual effect of the damages or breakdown upon other areas of the building or systems within it, shall be generally defined as major.

Within this contaxt, an inefficient reporting system is one of the primary causes of tenant inability to obtain

required assistance. The following outline is the procedure to be observed to assure proper service to tenant repair needs.

1. At initial move-in, each tenant will be instructed as to the normal operations of apartment equipment and a method for remedying simple problems. This orientation will include instructions on how to request repair services. The procedure will also be described within the Tenant Handbook to be furnished to each tenant at move-in. The tenant will be encouraged to request assistance whenever there is a problem with any of the apartment appliances or fixtures.

2. Repair service will be initiated by request in writing, in person or by telephone from tenant for service. The Management Office will normally be open from 9:00 a.m. to 5:00 p.m., Monday - Friday at which time either the Property Manager or Maintenance Man will receive the request. After 5:00 p.m., on weekends and holidays, Management will utilize an answering service to refer emergency calls to the Resident Superintendent or Property Manager. Routine maintenance calls will be held over to the next working day.

In either instance, the Management office will complete

a work order form (See Exhibit G) in triplicate for each maintenance request. The form completed in triplicate will indicate tenant's name, the apartment number and specific description of the problem. The original copy of the work order will be distributed to Maintenance Man and the pink copy will be retained by the Property Manager and the yellow copy by the Maintenance Man. At the same time that request is written on a work order, the Property Manager will also record it in the Maintenance log book indicating work order number, tenant name, address complaint, date and time of call. Once work is completed, Maintenance Man should get signature of tenant on work order. Maintenance Man will turn in work orders on a daily basis to Property Manager for his review.

The Property Manager will mark down stock used and hours to complete the job. He will then turn slips in to Resident Manager for review. Property Manager will record in work log the work done, man assigned, length of time for completion and whether or not tenant signed work order. Property Manager will record the above information on the pink copy of the work order and file in tenant's file. The Maintenance Man will match up the original and yellow copies of the work orders when completed and file in a building file.

3. All service requests must be received in the management office by 8:30 a.m. in order that they may be reviewed by the Property Manager and Maintenance Man for inclusion in the day's work schedule. Delivery of services will be given on a priority basis, based upon the order of receipt of the request and the apparent urgency of need. However, it is the goal of TSI to service all maintenance requests within 48 hours of request.

4. The Maintenance Man will assign repairs to appropriate personnel, indicating the order in which they are to be completed. Until the system is perfected, all service calls may not be completed within a single day. In these instances, the Maintenance Man will incorporate unserviced or uncompleted work into the next day's work schedule. Again, priorities will be established as to the order of repairs, with the previous day's work generally given first priority.

5. Repairs will be performed when the tenant is not home, if such authority is indicated on the request form. If not, Maintenance will leave a note and notify tenant to call when they will be home. (See Exhibit H)

6. Depending upon the extent of service requests, repairs may be made on Saturday mornings. Generally, all service

requests will be performed during the normal work day. Only emergency situations will be attended after 5:00 p.m. and after 12:00 noon on Saturdays and Sundays.

The following appliances and/or equipment are provided for the Tenants use during occupancy of leased premises; however, all appliances and/or equipment remain the property of the OWNER and shall not be removed from the leased premises:

Refrigerator

Disposal

Kitchen Range and Hood

Dishwasher (in 2, 3 and 4 bedrooms)

Air Conditioning Unit

Overhead lighting fixture located in Dining Area

Carpeting

Traverse rods in living room and bedroom(s)

Name _____

Address _____

Apartment # _____ Size _____

FAMILY COMPOSITION*

_____ AGE _____

_____ AGE _____

_____ AGE _____

_____ AGE _____

_____ AGE _____

_____ AGE _____

ELIGIBILITY

Rent Based on annual income of:

Rent Type:

*Only the listed persons are authorized to occupy the leased premises.

Tenant Services Inc.

LESSOR: TENANT SERVICES, INC.

By: _____ Date: _____

LESSEE:

_____ Date: _____

SECOND SHEET

MAINTENANCE TELEPHONE SURVEY

Week of April 9 con't.

TENANT'S NAME	ADDRESS	W.O.# PHONE #	COMPLAINT	W.O. REC.'D	SIGNED BY: ASSIGNED TO:	W.O. COMPLT.'D	RESPONSE TIME	MEN'S BEHAVIOR	TENANT'S COMMENTS
DAVERIE SMITH	136 Seaver St. #10	#021081 442-4694	1) Stove fan not working 2) balcony door needs screw for lock	3/23/79	not signed Boster	3/21/79	one day	Very Good	Good work Never has any problem Always good w

MANAGEMENT PLAN

INTRODUCTION

To insure the continued success of Hotel Oakland, an intensive management effort will be required of the developer, Housing Innovations, Inc., and the managing agent, Tenant Services, Inc.. The following plan is intended to respond to the special needs of this proposed development.

I. ROLE AND RESPONSIBILITY OF THE SPONSORS.

A. Supervisory Relationships.

Tenant Services, Inc. (TSI) shall, except as outlined below, be responsible for the day-to-day operation of the project. It is contemplated that the staff of the development will be responsible to the assigned Property Manager. The assigned Property Manager, in turn, will be accountable to the Regional Property Manager of TSI whose immediate supervisor is the Director of TSI. In turn, TSI answers to the owners, Housing Innovations, Inc..

B. Actions Requiring Sponsor Approval.

The Management Agent will be required to consult with Housing Innovations and HUD whenever there are significant deviations from the Management Plan and the project budget. The formulation of significant new policies will also require consultation with the Sponsor and HUD.

C. Management Decisions Independent of the Sponsor.

The Sponsor will clearly define the duties and responsibilities of the Property Manager so as to minimize the need for consultation over routine operational decisions. The areas of responsibility will include virtually every aspect of day-to-day operations, including administrative and maintenance matters, personnel administration, and tenant and community relations. The Sponsor will closely monitor the Property Manager's performance in these areas during the early stages of project occupancy and operations so as to assure a clear understanding of the Sponsor's expectations.

D. Key Contact Person for the Managing Agent.

The managing agent will be directly responsible to the Assistant to the President as his chief contact with the owner. The Assistant to the President is responsible for monitoring all projects managed by TSI by means of a monthly indices report which looks at the following critical areas of management performance:

(3) on-site inspections with the Property Manager at least once a month at which time the Regional Property Manager will meet the staff of the development and possibly the resident organization, if so requested. The Regional Property Manager and the Property Manager will also review the budget during these site visits; (4) review of monthly indices reports as explained in Section I. D. above.

G. Expenses of the Management Agent.

All services, whether covered or not by the management fee, will be consistent with those guidelines established in the HUD Handbook 4381.5 paragraph 3. The title of this handbook is "Compensation for Management Services in Multi-Family Housing Projects with Insured or HUD-held Mortgages".

II. PERSONNEL POLICY AND STAFFING ARRANGEMENTS.

A. Equal Opportunity Requirements.

TSI is a minority-owned company. The composition of the staff is identified in Exhibit B.

B. Employment of Project Residents.

Every effort will be made to employ existing residents for the management staff of the development. In addition, maintenance employment opportunities may also be available. Finally, the management staff will work closely with a representative organization of the residents to establish these policies and objectives.

C. Projected Staffing Needs.

Property Manager
Assistant Property Manager/Social Director
Receptionist
Bookkeeper
Maintenance Man
1 Janitor
3 Night Clerks

D. Job Description/Organizational Chart

1. Enclosed in this package is Exhibit C, which illustrates a complete breakdown of job descriptions, responsibilities and an organizational chart for the development.

E. Personnel Policy

1. Training and Promotion Opportunities.

Continuous review of employee responsibilities and the adoption of new and more effective techniques and procedures will be the principal mechanism for assuring employee efficiency and providing a basis for future promotions to positions of higher responsibility. In this regard, efforts will be made not only to improve upon skills for the employee's existing job category, but to provide training in related areas requiring a higher level of skills. Employees will be encouraged to take courses offered by the National Center for Housing Management and the Institute of Real Estate Management to improve their management skills.

2. Fringe Benefits.

All full-time employees will be entitled to sick and annual leave after an initial probationary period, national holidays and overtime pay for hours worked in excess of forty (40) per week. 75% of health benefits will be paid for by employer, with the employee paying 25%. Courses or training taken to improve work performance will be paid for by employer. See Personnel Handbook - Exhibit D.

3. Employee Grievance Procedures.

Employee grievances shall be initially handled by the employee's immediate supervisor, with the right to appeal decisions to the next higher authority. Where satisfaction is not achieved through the Property Manager, further appeals will be handled by the Regional Manager as the final authority. In the case of grievances of the Property Manager, the Director of Property Management will serve as the final authority in resolving situations not satisfactorily handled by the Regional Manager.

4. Employee Termination Procedures.

Employee terminations for all positions below Property Manager shall be effectuated by the Property Manager after review of the circumstances with the Regional Manager. In these situations, the Property Manager will review the causes for termination with the Regional Manager. If, in the judgement of both, the circumstances warrant giving the employee an opportunity to remedy the possible causes for termination, the employee shall be so advised and placed on probation for an appropriate period of time. This decision shall be conveyed to the employee by the Property Manager. Failure to remedy the condition(s) shall result in termination by the Property Manager.

III. PLANS AND PROCEDURES FOR PUBLICIZING AND ACHIEVING EARLY OCCUPANCY.

A. Advertisement of Units.

Advertising will be done primarily through the newspapers. In addition, local organizations who deal with low and moderate income persons will be contacted should vacancies occur. All of these activities will be directed to insure the immediate occupancy for as many years as possible upon their availability.

B. Affirmative Marketing.

Affirmative marketing practices will be utilized as outlined in the Affirmative Fair Housing Plan that has been attached.

C. Plans to Insure Economic and Racial Mix of Tenants.

As outlined in the Affirmative Fair Housing Marketing Plan, a plan will be undertaken to insure that at least 25 percent of the residents will represent minority groups. In addition, it is hoped that the intensive services being provided by the development will attract not only low-income persons but also moderate-income persons who will be eligible under the Section 8 program. Initially, contact will be made by letter (see Exhibit E) with follow-up telephone calls and personal visits.

D. On-Site Office.

An on-site office will be opened to take applications upon the initiation of the marketing effort. Office hours will be from 10:00 a.m. to 7:00 p.m. on week days for the convenience of both employed and unemployed applicants. In addition, the office will be open on weekends between 9:00 a.m. and 12:00 noon.

E. Inspection of Units.

During the initial rent-up period and whenever there are vacancies, applicants will be able to view a vacant apartment to see a typical layout. It is the intent of Management to collect security deposits in accordance with state law. Therefore, for the protection of both Tenant and Management, approved applicants will inspect their assigned units with a Management representative prior to move-in and both parties will sign a Statement of Conditions. The original will be retained in a Tenant File and a copy will be given to the tenant within the first 30 days of occupancy. It is understood that Management is required to give the list of existing damage (if any) to the resident if the resident requests it within the first 15 days of his/her occupancy. However, it is the opinion of Management that giving a copy of Statement of Conditions to residents initially is good management procedure and will avoid questions later, especially at the time of move-outs.

F. Orientation Services.

At the time of the initial interview, the interviewer will describe the general characteristics of the housing, its amenities, requirements for eligibility and application procedures. A written summary of the development's features will be provided to each applicant whose pre-application would appear to justify the submission of a normal application for admission. The summary will include a description of the application review process and the tenant will be offered any appropriate assistance that may be required to complete the application.

Applicants who are eligible to occupy an apartment and who are approved will be furnished with a set of materials that will describe, in layman's terms, the responsibilities of the tenant and the sponsor, and a sample copy of the lease to be executed. Applicants who agree to comply with the terms of the lease will be offered an available apartment of an appropriate size.

Each approved tenant will also be furnished with a resident handbook which will serve as an initial reference for all matters related to apartment occupancy. The handbook will also include information on the operations and care of apartment equipment and suggested methods of housekeeping and care of that unit to prevent frequent need for maintenance service. Enclosed is a Resident Handbook developed by TSI for its Concord Houses development. (See Exhibit F.) The handbook for this development will follow the same format but be tailored to the particular development. Additional information will be provided with regards to tenant organizational activities and social services that are available at the local public and private agencies. The purpose of the orientation session is to inform residents of Management policies, of proper care of the appliances of the unit, of use of laundry rooms and community rooms, of neighborhood and municipal services, and of the resident organization. Slides of the apartment features are shown by the Property Manager and fully explained. The staff of the development will be introduced to the residents at these meetings. A representative from the resident organization will also be invited to make a brief statement. In order to "break the ice" for new residents, and instill a sense of community among all residents, each orientation session will be structured to include both existing residents and new residents who will be living in the same doorway. Enclosed as Exhibit G is a sample orientation package that will be given to each new resident at the session.

Post-occupancy sessions will be held with the resident within the first six months after construction is completed. It has been the experience of Management that holding these meetings on a floor-by-floor basis promotes better communication between the families who share a common corridor and allows Management to deal specifically with the problems unique to that particular building.

G. Tenant Selection.

Applicants will be required to complete an application form which will be carefully checked in terms of present and past rent paying history, of housekeeping, of relationship with Management, of relationship with other residents, of respect for property by applicant, children and guests, and of credit history. Applicants found satisfactory in all areas will be considered for residency satisfactory in all areas will be considered for residency at the development. Applicants with unsatisfactory references in any of the above areas will be notified in writing that they are rejected and the reasons why. Final decisions regarding application approval/rejection will be totally shared by the Director of Property Management, Regional Property Manager and Property Manager during initial rent-up. With increased experience in this area, it is expected that the Property Manager will assume full responsibility for processing applications. The Regional Property Manager will continue to review applications prior to acceptance. Once initial occupancy has been achieved, a Tenant Orientation Committee will be organized to meet approved applicants and introduce them to "life at the development" from a resident viewpoint. It has been our experience that this procedure allows new residents to feel comfortable as soon as they move in and to immediately know some of their neighbors.

IV. PROCEDURES FOR DETERMINING TENANT ELIGIBILITY FOR CERTIFYING AND RECERTIFYING INCOMES.

A. Responsiblity for this Function.

The Property Manager will be responsible for this function. Tenant eligibility for initial occupancy with respect to income will be based on written verification of income from employers, social workers or other sources. Persons owning their own businesses will be required to submit W-4 forms for the previous year. All applicants will have to be within the established Section 8 income limits for the area.

In accordance with Section 8 guidelines, residents will be recertified at least every two years according to the following established TSI procedure:

1. A card file for all residents to be recertified should be set up. File should be divided into twelve months.

2. Index card should indicate the following:

   - Resident Name

   - Resident Address and Apartment Number

   - Monthly Rental Rate and Subsidy Program

   - Bedroom Size

- Number of Persons in Household

- Occupancy Date

3. Card should be used to indicate recertification history, e.g.;

Recertified	01/01/76
New Income Information Requested	11/01/76
Recertified	01/01/77

4. Cards should be filed alphabetically by recertification month.

5. Each month, index cards should be reviewed. Letters requesting updated income information should be sent out to tenants two months prior to recertification date. If information is not received by one month prior to recertification date, a second letter should be sent requesting necessary income information. This letter should indicate that subsidy and/or occupancy will be threatened if information is not received.

B. Background of the Property Manager Regarding this Function.

The Property Manager will probably have prior experience regarding certification and recertification requirements. But, regardless of experience, the Manager will be trained intensively by the Regional Property Manager and the Director of Tenant Services, Inc. and will receive on-the-job training on other developments prior to his/her taking over the position at the development. The Director of TSI will closely monitor the performance of the Property Manager regarding certification requirements.

C. HUD Requirements.

HUD requirements covering family size and composition relating to unit size, will be fully explained to the Property Manager during the training period.

V. PLANS FOR CARRYING OUT AN EFFECTIVE MAINTENANCE AND REPAIR PROGRAM.

An overview of the maintenance program shall be prepared yearly by the Property Manager and reviewed for appropriate modifications and adjustments in order to make it responsive to specific needs of the project and otherwise responsive to limitations of the operational budget. The program will be designed to reflect consideration of three major areas--routine maintenance, preventive maintenance and repairs.

Routine maintenance is that level of maintenance performed on a regular basis (daily, weekly or as require) and is designed to achieve cleanliness and attractive conditions both within the buildings and on the grounds.

Preventive maintenance is that level of maintenance that is required to prevent more serious corrective actions through the undertaking of scheduled activities that will keep the item or system in good repair, i.e., the preventive maintenance of the mechanical systems (heating, water supply, elevator, etc.). Regular inspection of non-mechanical areas and the performance of basic repair shall be similarly undertaken to prevent the need for more extensive corrective actions at a future date.

Repairs are those actions that are either requested by the tenant or observed by Management in the course of apartment inspections of interior and exterior public areas and equipment. Also included in the latter are failures in mechanical systems or damages that have been sustained by the building, grounds or equipment. Repairs are of two levels--those which can be performed by on-staff personnel and those requiring outside services to bring the item back into good service or condition. Every reasonable effort shall be used to avoid the use of outside services in the interest of operational economics. Such will be accomplished by maintaining equipment in good condition through preventive maintenance scheduling; orientation of the tenants on the proper operations of mechanical and other items; and by the institution of training programs that will increase the skills of janitorial personnel to perform maintenance level duties.

To achieve the above objectives, the following maintenance schedule will be taken:

(1) Daily

(a) Clean exterior grounds.
(b) Clean around trash receptacle areas.
(c) Vacuum public landings on all floors of each building.
(d) Sweep stairwells
(e) Sweep laundry rooms
(f) Police grounds and sitting areas for paper and other debris.
(g) Sweep and dust management office.
(h) Empty public trash disposal cans.

(2) Twice Weekly

(a) Clean lint traps in laundry equipment.
(b) Mop laundry rooms.

(3) Weekly

(a) Remove graffiti from walls.
(b) Dust light fixtures.

(4) As Required

(a) Sweep community rooms on days following use; mop bi-weekly, unless required more frequently.
(b) Change light bulbs in public areas (indoors) and out on an established lightbulbing schedule.
(c) Dust walls and fixtures in public halls weekly.

(5) Semi-Annually/Annually

(a) Maintenance personnel will inspect and repair hot water systems regularly.
(b) Circulating pumps will be oiled and forced hot water systems bled twice annually.
(c) Water pressure, temperature, heating assembly of the D.H.W. are checked annually and the heater tank will be drained.

(6) Other Activities

(a) Perform apartment repairs as requested and assigned.
(b) Seasonal grounds maintenance (lawn and shrubbery care).
(c) Maintenance of outdoor furniture.
(d) Inspection of appliances (refrigerators and stoves).
(e) Installation and maintenance of air conditioning equipment per instructions.
(f) Instruct in operations of appliances.
(g) Assist in the cleaning of apartments related to tenant moves.
(h) Extermination.

The above activities shall be performed under the general direction of the Resident Superintendent. The latter shall assist in janitorial duties two or three hours of each day, the balance of his time to be devoted to apartment and other repairs and maintenance of equipment systems as required. All maintenance personnel shall meet daily to discuss and coordinate the day's activities. A similar meeting shall be held between the Maintenance Man and the Property Manager for the purposes of coordination and to allow for the input of apartment repair requests into the daily maintenance schedule.

Inspection schedules shall be performed at two levels...those applying to public and supportive areas (halls mechanical equipment and rooms related thereto, grounds etc.) and the individual apartments.

Apartment inspections shall be performed by the Property Manager on an annual basis (unless it becomes evident that more frequent inspections are in order). These inspections are designed to determine that the unit is being properly maintained and cleaned and that mechanical equipment is in good repair. Residents will receive notification to be at home during the inspection. In addition to checking for maintenance problems in the apartment that have not been called in by the resident,

the Property Manager will pay particular attention for the following:

- Poor Housekeeping
- Additional beds or persons in the apartment
- Evidence of Pets
- Waterbeds
- Extra locks on doors
- Washing machines or freezers
- Paint jobs on walls

If any of the above problems are found, the resident is to be notified immediately that they are in violation of the lease agreement and that the situation must be resolved immediately. The Property Manager will alert the appropriate social service agency if the problem is strictly poor housekeeping. Follow-up inspections will be made within one week of initial inspection. Pictures will be taken at the second inspection. If the situation has not improved, the Property Manager will take necessary action to remedy the situation.

Inspection of non-residental areas shall be performed on two levels:

(1) The Property Manager and maintenance personnel will be trained to visually inspect all areas of the buildings and grounds while in the course of performing their normal duties on a day-to-day basis. Annually, all such areas should receive a more intensive inspection where each component of the building (bearing walls, roof, windows, fountains, etc.) and grounds will be examined against a check-list of specific items. These latter inspections shall be performed by the Property Manager and maintenance personnel.

(2) Scheduled inspections shall be made of mechanical systems in compliance with the instructions and warrantee certificates.

(a) Inventory and Service of Mechanical Equipment and Appliances.

A file will be maintained on all appliances and mechanical equipment. Each file will identify the item by its model and serial number, the date of purchase and installation, the existence or expiration of warrantees, guarantees and service contracts and a record of the date and extent of repairs.

As indicated above, mechanical equipment serving total project needs will be inspected routinely or in conformance with preventive maintenance schedules. Appliances will be inspected for condition and serviceability prior to installation within the units and during the course of the annual apartment inspection. As move-outs occur, the appliances in each apartment will be inspected to detect any damages or requirements for repair that would justify an assessment of

appliances (refrigerators and stoves) to exceed the number of apartments so as to provide replacement units where appliances require removal for repair.

(b) Inspection and Maintenance of Units Prior to Move-Outs.

(i) Residents will be required to notify the management office by certified mail of intention to move at least 30 days prior to the actual moving date. The Property Manager will then notify resident by certified mail of the time and date of inspection, which must be within 5 days or 5 days after resident's move. The Property Manager and resident will inspect the apartment together. If there is any damage to the apartment, Management may withhold a portion of the security deposit to cover costs. However, the Property Manager must send the resident, by first class mail to his last known address, a written list of the damages claimed, together with a statement of costs acually incurred. If Management fails to do so within 30 days after termination, Management loses the right to the deposit to offset damages. These provisions will be adapted to conform with California state law on security deposits.

(ii) It is the goal of Management for vacancy turnover to be within thirty days. Therefore, upon receipt of notification of the move, the Property Manager will examine a continually updated waiting list of prospective tenants and contact the applicant at the top of the list desiring an apartment of the size to be available. Administrative work necessary to a determination of eligibility shall be initiated.

(iii) Upon determining the eligibility of the prospective tenant, a formal offering of the apartment shall be made and, if accepted, a new lease executed. Applicable policies and procedures as regard occupancy in the development shall be reviewed with the tenant..

(iv) The move-in and move-out date(s) shall be coordinated through the management office and the Resident Superintendent will be generally available on those dates to assist in making the moving procedure run smoothly.

(c) Schedule for Painting and Redecorating.

Design of the structure and the use of material and finishes requiring minimal maintenance is expected to result in little need for exterior painting.

Exterior surfaces that are painted, will be closely inspected annually to determine the need for repainting and repair.

Similarly, surface finishes in public areas that are expected to have a high level of tenant traffic and use will be of a type that will require minimal need for painting, refinishing or replacement. A high level of routine maintenance (washing, dusting, spot removal, repair) should also minimize the need for these drastic actions. Notwithstanding, ceilings and other areas where painting and redecorating is required, will be inspected and repainted every two years to maintain a fresh appearance.

The interior of each apartment will be repainted by Management every three-five years. The painting will be provided at no additional expense to the resident from a standard selection of colors. Vacated apartments will be repainted prior to occupancy by the new resident.

(d) Garbage and Trash Removal.

Compactor chutes have been conveniently placed at several locations in the development for trash removal by the residents. It will be the responsibility of each resident to remove trash from the apartments to the receptacles. If residents have large items that they would like removed, they will be requested to notify Management so that a special pick-up can be made. The Resident Superintendent will monitor the emptying of the receptacles by the trash removal company to assure that it is in accordance with contract (i.e., correct number of pick-ups per week).

(e) Major Repairs .

Through the provisions of properly executed preventive maintenance program and immediate attention given to needed minor repairs, it is anticipated that major repairs will be minimized. Notwithstanding, where such cannot be avoided, the Maintenance Man will provide interim repairs where possible and determine the need for more extensive repairs by outside services. Depending upon the nature of the equipment or system, service contracts may be provided by appropriate firms. The objective however, will be accomplished through a continuous training program of all maintenance personnel to improve the level of their skills and to provide them with a level of proficiency that will permit most repairs by the maintenance staff.

(f) Grounds Upkeep and Maintenance.

Outside areas should be inspected and policed for the removal of debris on a daily basis. Shrubbery shall be trimmed seasonally and grass areas mowed by the maintenance staff weekly during the growing season.

(g) Cleaning of Common Areas.

Common areas should be inspected and cleaned on a daily basis. The frequency and extent of cleaning of specific areas is indicated in item V.5(a) above.

(h) Reports on Minor Repair Needs.

Through prompt attention to minor repairs in individual units, more serious and expensive maintenance problems can be averted. Minor repairs result from damages and/or breakdowns in systems that are beyond normal tenant repair capabilities and require the services of the maintenance staff. Repairs that require the services of an outside firm because of the complexity of the problem and possible residual effect of the damages of breakdown upon other areas of the building or systems within it shall be generally defined as major.

Within this context, an efficient reporting system is one of the primary causes of tenant inability to obtain required assistance. The following outline is the procedure to be observed to assure proper service to tenant repair needs.

- At initial move-in, each resident will be instructed as to the normal operations of apartment equipment and a method for remedying simple problems. This orientation will include instructions on how to request repair services. The procedures will also be described within the Resident Handbook to be furnished to each resident at move-in. The resident will be encouraged to request assistance whenever there is a problem with any of the apartment appliances or fixtures.

- Repair service will be initiated by request in writing, in person or by telephone from tenant for service. The Management Office will be normally open from 9:00 a.m. - 5:00 p.m., on weekends and holidays, Management will utilize an answering service to refer emergency calls to the Maintenance Man or Property Manager. Routine maintenance calls will be held over to the next working day.

In either instance, the Management Office will complete a work order form (Exhibit H) in duplicate for each maintenance request. The form completed in duplicate will indicate resident's name, the apartment number and specific description of the problem. The original copy of the work order will be distributed to the Maintenance Man and the pink copy will be retained by the Property Manager will also record it in the maintenance log book indicating work order number, tenant name, address, complaint, date and time of call.

Once work is completed, Maintenance Man should get signature of tenant on work order. Maintenance Man will turn in work orders on a daily basis to Resident Superintendent for review. Maintenance Man will mark down stock used and hours to complete the job. He will then turn slips in to the Property Manager for review. Property Manager will record in work log the work done, man assigned, length of time for completion and whether or not tenant signed work order. Property Manager will record above information on the pink copy of the work order and file in a building file. The white copy will be forwarded the main Management Office.

- All service requests must be received in the Management Office by 8:30 a.m. in order that they may be reviewed by the Property Manager and Resident Superintendent for inclusion in the day's work schedule. Delivery of services will be given on a priority basis, based upon the order of receipt of the request and the apparent urgency of need. However, it is the goal of TSI to service all maintenance requests within 48 hours of request.

- The Property Manager will assign repairs to appropriate personnel, indicating the order in which they are to be completed. Until the system is perfected, all service calls may not be completed within a single day. In these instances, the Maintenance Man will incorporate unserviced or uncompleted work into the next day's work schedule. Again, priorities will be established as to the order of repairs, with the previous day's work generally given first priority.

- Repairs will be performed when the tenant is not at home, if such authority is indicated on the request form. If not, Maintenance will leave a note and notify tenant to call office when they will be home. (See Exhibit I.)

- Depending upon the extent of service requests, repairs may be made on Saturday mornings. Generally, all service requests will be performed during the normal work day. Only emergency situations will be attended after 5:00 p.m. and after 12:00 noon on Saturdays and Sundays.

(i) Maintenance Performance.

In addition to the above-mentioned reporting system, Management has developed several methods to monitor maintenance performance:

- Weekly Maintenance Telephone Survey of residents who have had work done in their apartments (See Exhibit J).

- Review of Maintenance Response Time in monthly indices (See Exhibit A).

- Monthly interview with tenant regarding maintenance and janitorial delivery systems (Exhibit A).

VI. RENT COLLECTION POLICIES AND PROCEDURES.

A. On-Site Collections .

Payments will be accepted at the site office or by mail. Cash payments will not be accepted and there will be no attended after-hours depository.

B. Partial Payments or Pre-Payments.

Rent will be due on the first of each month and pre-payments will be accepted if offered by any resident. Full payments will be strongly encouraged to simplify the work of the Accounting Department in the monitoring of rent collections. However, partial payments will be accepted as a response to the financial limitations of some of the residents.

C. Late Fees.

No late fees will be charged on delinquencies.

D. Missed Payments.

If a rent payment is not made within the first five days of the month, the Property Manager will contact the resident by telephone or by dunning letter. If payment is not made by the ninth of the month, the Property Manager will initiate eviction proceedings against the resident. During this period, the Property Manager will attempt to work out the financial problems of the resident with him.

E. Financial Referral Services.

If required, the Property Manager will refer the resident to a financial counselor or social worker to assist the resident with his budgetary problems.

F. Eviction Policies and Procedures.

If full payment is not made by the twelfth of the month by delinquent tenant, Management will start eviction proceedings immediately.

Residents will be expected to abide by terms of their lease. Residents will first be notified in writing by the Property Manager of any lease violation. If non-compliance persists, Management will initiate legal action against lease violators.

G. Recording of Rent Payments.

All rent checks and security deposit payments will be made at the site office of the development. The Property Manager will be responsible for recording and depositing rent checks in a local bank. Rent payments will be kept in a separately-titled account. Security deposits will be maintained in accordance with California state law. The Property Manager must deposit the amount of each security deposit in that account within thirty (30) days after he receives it. Copies of all deposits and checks will be forwarded daily to the Central Office for recording purposes.

VII. PROGRAM FOR MAINTAINING ADEQUATE ACCOUNTING RECORDS AND HANDLING NECESSARY FORMS AND VOUCHERS.

A. Accounting and Purchasing Procedures.

The accounting and purchasing procedures of TSI are consistent with the HUD handbook of FHA requirements governing fiscal operations, accounting, and financial reports for multifamily projects. (Form #2410).

B. Reporting Requirements.

HUD Forms 93479, 93480, 93481 will be prepared on a monthly basis by the Accounting Department. The Controller is responsible for day-to-day operations of the accounting. Moreover, this system has been computerized so that monthly income and expense statements, balance sheets and rent statements are available in a timely fashion.

C. Tenant Certifications and Recertifications.

Prior to a resident moving into his apartment, all required certifications must be completed. The certifications are then filed in a special folder kept for each resident. Recertifications will be the responsibility of the Property Manager and these will also be kept in the resident file.

D. Monitoring of Project's Cash Flow.

The current accounting system employed by TSI provides a monthly income and expense statement which allows the Manager and the Sponsor to easily monitor the cash flow.

E. Monthly Accounting Report.

During rent-up and subsequent to the rent-up, the Sponsor and the HUD office will receive the monthly accounting report by the fifteenth of the month.

VIII. PLANS FOR TENANT/MANAGEMENT RELATIONS.

A. Procedures for the Handling of Tenant Grievances.

As outlined in the Staffing Section of the Management Plan, there will be

a substantial number of management employees--Manager, Maintenance Man and janitor-- to handle the day-to-day problems of the resident. It is hoped that the services that this staff will provide will result in a minimum of grievances. However, it will be the responsibility of the Property Manager to handle any tenant grievance. In addition, there will be a representative committee of the residents which will meet with the Property Manager on a monthly basis. At this time, specific grievances can also be raised.

The Owner will attend some of these meetings. In addition, it will be the responsibility of the Property Manager to notify the Sponsor/Owner of any significant grievances that may require his attention.

B. Servicing of Tenant Requests.

All tenant requests will be submitted to the Property Manager who will be responsible for delegating this work to appropriate individual, i.e., the Resident Superintendent or the janitors.

Tenant requests will be closely monitored by the Property Manager to insure that the requests are processed expeditiously.

C. Tenant Orientation.

Prior to moving in, all tenants will be oriented to the project to insure their familiarity with the equipment included in these units, the equipment available in the building and the various services the development offers.

D. Leasing Policies and Procedures.

Leasing policies and procedures shall reflect responsibilities of the Sponsor as described in the Regulatory Agreement, FHA Form No. 2466 and is identified in the FHA "Model Form of Section 8 Lease under Section 221(d)(4)". These leases will require minor modification to reflect specific requirements of the Sponsor and local practices.

E. Leases in Foreign Languages.

The majority of potential tenants who are expected to apply will be English-speaking and Oriental. We will have the standard lease form in both English and Chinese. A bi-linqual staff person will be available to review lease provisions with Oriental residents.

Some latitude may be required in the interpretation of lease provisions to achieve the objectives of the Sponsor and tenant alike. This shall be achieved through the adoption of policies and procedures that reflect awareness of potential tenant problems and willingness to work with the tenant in resolving these problems. Strict interpretation of the lease shall only be applied where tenant willfully violates his

responsibilities, where the tenant's circumstances are beyond resolution and additional consideration would be unfair to other tenants, or where as a result of liberal interpretation of the lease the Sponsor's actions would conflict with his responsibilities as outlined in the Regulatory Agreement .

F. Copy of Proposed Lease.

A copy of the proposed lease has been attached for review and approval (See Exhibit K).

G. Cooperation with Tenant's Organization.

In the past, TSI has fostered tenant organizations within all of its developments. Tenant Services, Inc. believes that having such organizations results in better management-tenant relations.

H. Support and Participation of Tenants.

The managing agent will enlist tenant support and participation in a manner similar to past efforts; namely, by organizing tenant meetings, by reinforcing tenant feedback, by maintaining courteous staff/tenant relations and by periodic newsletters (See Sample Newsletter-Exhibit L).

IX. SOCIAL SERVICE PROGRAM.

A. Social/Referral Services.

The Property Manager will be responsible for developing and maintaining a current, city-wide listing of available social services to accomodate the needs of the tenant population.

B. Social,Recreational and Education Services.

The management staff in conjunction with a resident committee will be responsible for developing a comprehensive social, recreational and educational program that will draw on the resources of the development as well as those of the surrounding area. Local community resources include public libraries, museums, events at public recreation areas, to name a few. (See sample calendars of activities at Hotel Oakland Exhibit M).

C. Counseling Services.

The management staff of the development will provide informal and formal financial and social counseling for the residents, both during and after relocation. More importantly, they will provide a link with government agencies and those professional services that the residents may require during the relocation period and for new tenants thereafter (e.g., legal, social, psychiatric, etc.).

D. Security.

Considerable time will be spent at tenant orientation discussing tenant and management responsibility regarding security. The Property Manager will establish and maintain a direct line of communication with the local police. This will facilitate police cooperation, should there be any security problems.

X. MANAGEMENT AGREEMENT.

The Standard Section 8, 221(d)(3) Management Agreement form will be used.

EXHIBIT A

INDICES

Project _____

Long Term GOAL							
4.5	Building Exterior						
4.5	Building Interior						
	Budget vs. Profit, Loss						
95%	Collections vs. Charges						
3	# Tenants Owing 4 + Payments						
30	Payables Paper Flow Period						
5	Number of Vacancies						
30	Vacancy Period						
10%	Tenant Selection						
2	Maint. Response Time						
	Break-Ins						
	No Heat						
	Turnover - Moveouts						
	Evictions						
	Survey - Maint.						
	Genl.						

MONTHLY JANITORIAL & MAINTENANCE REPORT

BERGEN CIRCLE
GIRARD AVE
Development Name

Tenant Name/Address: SARAH WIGFALL Apt # Tel 737-0925 Date: 1/4/70
HANDICAP 15 GIRARD AVE SPRINGFIELD By

Are you satisfied with the Janitorial and maintenance service?	FINE	
Are the corridors, stairs & hallways clean?	FINE	
Are the corridors properly lit?	FINE	
Is the laundry area clean?		
Are the TSI employees courteous?		
a. Janitors?	GENERALLY	
b. Maintenance Staff?		
c. Property Manager?		
When problems arise, are they resolved promptly?	N/A	
Are your windows & locks secure?	FINE	
Does the intercom & surveillance system function properly?	FINE	
Are there problems with vermin?	NO LONGER	
Are there electrical problems?	NONE	
Are there problems in public halls?		

Are there plumbing problems? 1. Dripping Water? 2. Toilet/Tub? 3. Kitchen Sink/Disposal?	NONE	
Any problems with doors/windows?	—	
Are there problems in the front/back yards?	N/A	
Are there problems in the trash/dumpster area?	N/A	
Are there problems with the trash collection day(s)	N/A	
Are there problems with the neighbors?	NO	
Any other problems?	SATISFIED	

MANAGEMENT PLAN

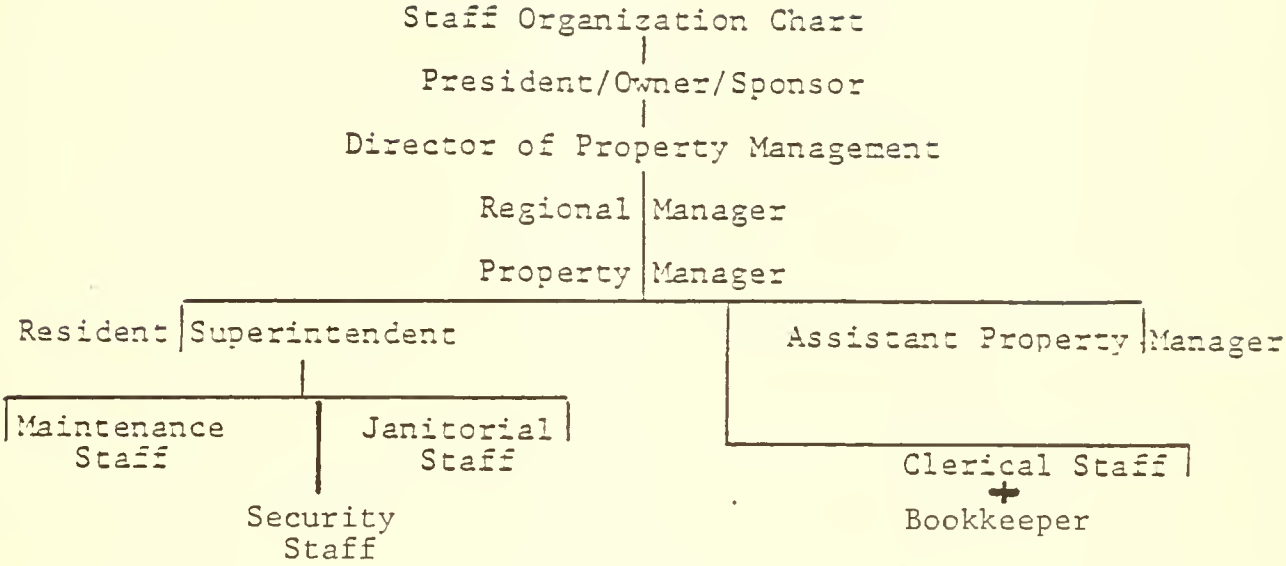
EXHIBIT B

RACIAL COMPOSITION OF TENANT SERVICES, INC.

I.	Professional	Black	White	Spanish
	M	4	1	
	F	6	3	
II.	Other			
	M	24	2	7
	F	7	2	

EXHIBIT C

Staff Organization Chart



Supervisory Relationships

Tenant Services, Inc. (TSI) shall, except as outlined below, be responsible for the day-to-day operation of the project. It is contemplated that the staff of the development will be responsible to the Property Manager. The Property Manager, in turn, will be accountable to the Regional Property Manager of TSI whose immediate supervisor is the Director of TSI. In turn, TSI answers to the owners, Housing Innovations, Inc.

MANAGEMENT PLAN

EXHIBIT C

PROPERTY MANAGER DUTIES

a. Tenant selection;

b. The leasing of new and turnover apartments;

c. The collection of rent, including the issuance of legal late rent notices and their follow-up in case of non-payment of rent;

d. Maintaining full occupancy of the development with less than five per cent loss of revenue due to unrented space after moveouts or to collection losses from nonpayment of rent;

e. The development of janitorial personnel to assure proper cleanliness and maintenance of common spaces, sidewalks, parking lots and grounds;

f. The acceptance of work or service requests for repairs and maintenance of apartments, common spaces, structures and grounds;

g. The assignment of work orders to the maintenance personnel, including follow-up to insure proper completion in a reasonable length of time;

h. The frequent inspection of grounds, parking lots, common spaces and apartments for proper cleanliness and maintenance;

i. With Owner approval, the negotiation and supervision of all necessary maintenance contracts;

j. The purchase, after competitive pricing, of all materials and supplies necessary for the project on a purchase order form approved by the Owner;

k. The maintenance and security of a small inventory of supplies necessary for regular operation;

l. Keeping an inventory of all capital and noncapital items of personal property, with a description of their value and condition (this will include all ranges and refrigerators with their location and serial number as well as all other equipment, including everything from a tractor to hoses and sprinklers used for watering, but will not include replacement items, such as glass, lightbulbs, etc.);

m. Setting up and maintaining on an accrual basis a bookkeeping system that includes a journal, a ledger and a rent roll control system. The accounting system should meet HUD requirements;

n. The development of yearly operating budget;

o. The annual inspection of structures, grounds and apartments for necessary repairs, preventive maintenance and housekeeping evaluation;

p. The prompt monthly preparation and forwarding of all forms required by HUD to the _____ HUD office;

q. The preparation within the 60-day time limit of the annual survey;

r. The annual and bi-annual verification and certification of income for Section 8 and regular tenants according to their move-in date and date of their lease; and

s. The creation of a program, through the tenant organization and the owner, to insure maximum tenant cooperation by promoting community programs for adults and children; community standards for conduct, housekeeping and property maintenance; tenant complaint procedures; and maximum utilization of community resources such as welfare, social services, schools, police and other agencies.

MANAGEMENT PLAN

EXHIBIT C

MAINTENANCE MAN

Job Description

- Report to site office daily at 8:00 a.m.
- Complete work orders within twenty-four hours of assignment
- Maintain maintenance log on a daily basis and submit to Property Manager
- Assist in upkeep of storage area and of maintenance supply inventory
- Report any problems, damage to the property, etc. to the Property Manager
- Assist Property Manager in developing and maintaining a preventive maintenance program
- Respond courteously and efficiently to all regular requests for service within 48 hours, and to Emergency requests immediately
- Be on call for emergencies on evenings and weekends as per schedule approved by Property Manager
- Adhere to general administrative policies of Tenant Services, Inc.
- Perform any other assigned duties to assure the smooth operation of the development

Tenant Services Inc.

MANAGEMENT PLAN

EXHIBIT C

JANITOR

Job Description

- Report to the site office daily at 8:00 a.m.
- Report any problems, damage to the property, etc. to the Maintenance Man or Manager
- Complete janitorial work log on a daily basis and submit to Maintenance Man.
- Sweep and mop landings, stairwells daily/as needed
- Sweep sidewalks and gutters around buildings daily
- Sweep out parking lots as needed
- Remove all marks and dirt from all corridor walls daily
- Remove all marks and dirt from all community rooms/ laundry walls as needed
- Dust window sills and banisters in corridors, stairwells and laundry rooms daily
- Dust and wash interior and exterior light fixtures as needed
- Replace bulbs throughout as per established lightbulbing schedule
- Sweep and mop laundry room as needed
- Empty barrels from laundry room and exterior grounds as needed
- Clean washers and dryers daily.

MANAGEMENT PLAN

EXHIBIT D

PERSONNEL POLICY HANDBOOK

TENCON SERVICES, INC.

MANAGEMENT PLAN

EXHIBIT E

SAMPLE LETTER TO LOCAL BUSINESSES AND EMPLOYERS

Dear Sir/Madame:

_____ Apartments has a set goal to establish a resident community that will reflect enthnically and economically New York's general population.

The enclosed brochure will describe _____ Apartments and give you a glimpse of the development. Typical floor plans and rent schedules are included. Two and three bedroom apartments are still available with an early 1979 occupancy date. We need your assistance in reaching your employees and co-workers.

If you should wish materials for distribution, please contact me. I am available to meet with you at your convenience. Applications can be obtained at our Rental Office, _____ Street, New York. Office hours are 10:00 a.m. to 7:00 p.m., Monday through Friday.

Thank you for your assistance.

Yours truly,

TENANT SERVICES, INC.

Property Manager

Enclosures

MANAGEMENT PLAN

EXHIBIT F

RESIDENT HANDBOOK

Concord Houses

RESIDENT HANDBOOK

MANAGEMENT PLAN

EXHIBIT G

SAMPLE ORIENTATION PACKAGE

WHAT IS A HOME?

We who have a home
Have treasures to behold
A workshop to be proud of
When days are sad and cold.

All the profit and the pleasure
And happiness combined
The rarest gift of all I find
Is home and peace of mind.

Erma Randall

Tenant Services Inc.
An Affiliate of Housing Innovations Inc
50 FRANKLIN STREET · BOSTON MASSACHUSETTS 02110
426-5266

SECURITY REMINDER

HAVE YOU INSURED YOUR PERSONAL BELONGINGS AGAINST THEFT YET?

FEDERAL CRIME INSURANCE CAN BE PURCHASED
AT MINIMAL COST FROM:

UNITED BROKERS INSURANCE AGENCY

DON'T WAIT UNTIL IT'S TOO LATE

SECURITY IS THE JOINT RESPONSIBILITY OF MANAGEMENT and RESIDENTS.

Property Management

INFORMATION ON

MAKING MOVING EASIER

Check to see if you have taken care of these details ahead of time in order to make moving easier.

__Electric Company

__Gas company

__Telephone company

__Water company

__Board of Elections (voter registration card)

__Depart. of Public Welfare

__Draft Board

__Medicaid

__Medicare

__Motor Vehicle Bureau (driver license, car registration)

__Post Office (get change-of-address cards from mailman)

__Schools

__Social Security Office (social security checl

__Banks

__Doctor

__Insurance companies

__Credit card accounts

__Milkman

__Newspaper and magazine subscriptions

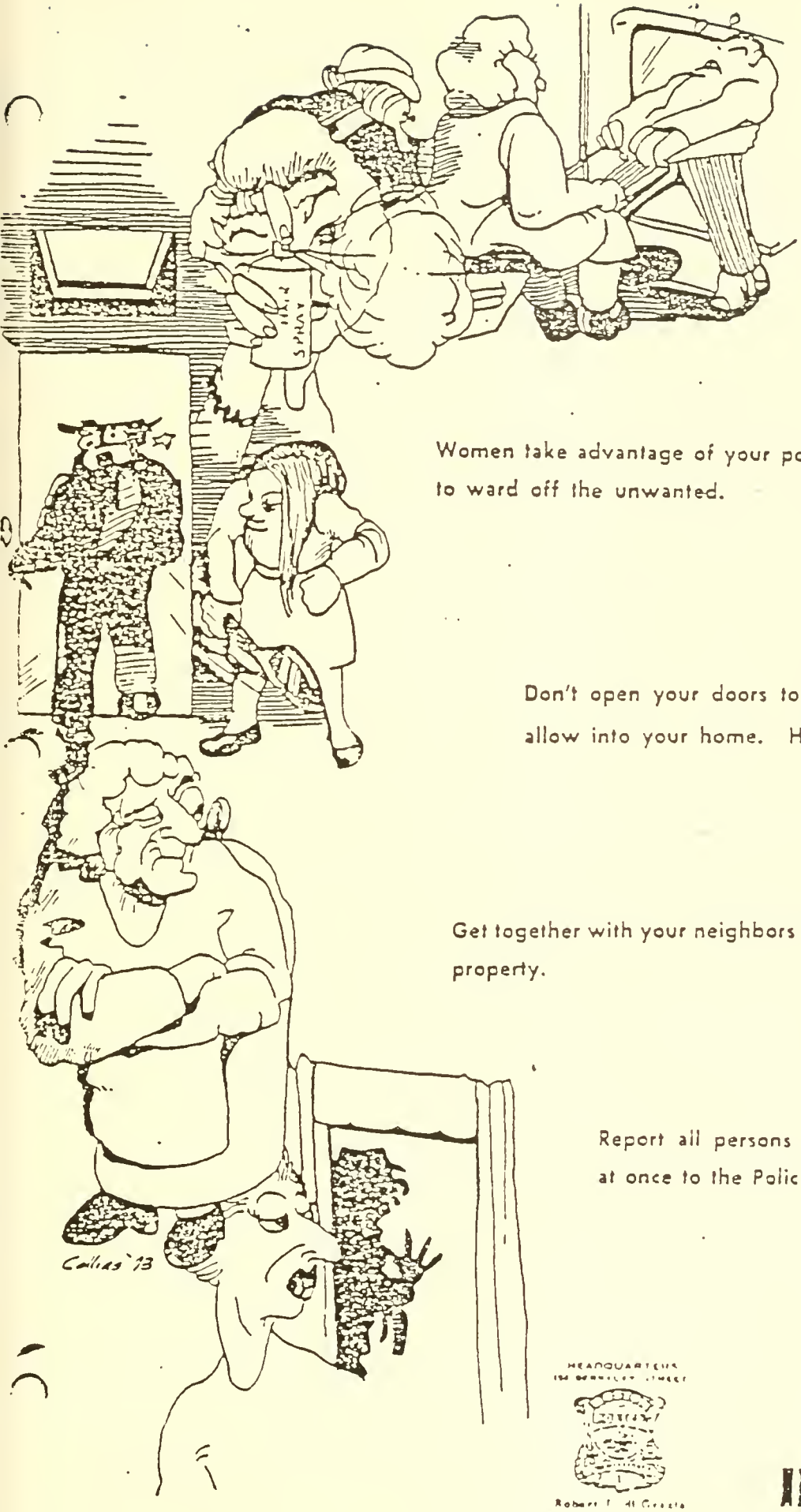
__Put important papers where you can find them easily on moving day.

__Check insurance to see if it covers damage to your belongings during move.

__If you have a TV antenna, remember to take it down.

__Be sure rugs, curtains and clothes are clean before you move.

__Collect plastic bags, boxes and crates that you will need for packing.



Always carry your purse close to your body and keep a firm grip on the latch.

Women take advantage of your possessions, they may come in handy to ward off the unwanted.

Don't open your doors to strangers; be certain of whom you allow into your home. Have a peephole device installed.

Get together with your neighbors and keep an eye out for one another's property.

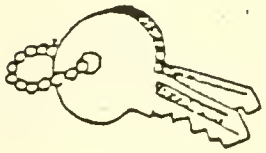
Report all persons or automobiles of suspicious nature at once to the Police. Dail 911

COURTESY OF
CRIME PREVENTION SECTION

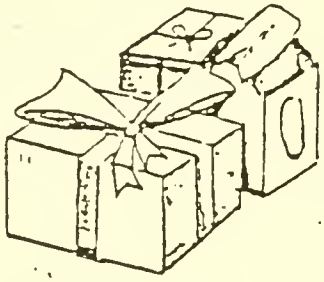
Boston Police

MR. DRIVER:

Take Your

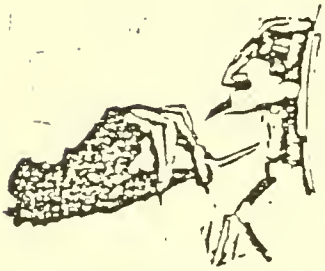


Put

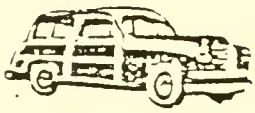


In The Trunk

Or Cover Them



LOCK YOUR



Please Help Us

To Protect Your Property

COURTESY OF
CRIME PREVENTION SECTION

HEADQUARTERS
154 BERKELEY STREET

Robert J. di Grazia
Police Commissioner

Boston Police

FEDERAL CRIME INSURANCE PROGRAM

COMMERCIAL AND RESIDENTIAL POLICIES

AVAILABLE NOW AT REDUCED RATES
THROUGH ANY LICENSED PROPERTY INSURANCE AGENT OR BROKER

- Commercial Crime Insurance Policies —

  To protect your business against loss for up to $15,000 with a choice of the following coverages:

  Option 1: Burglary, safe burglary, robbery inside and away from the premises and resulting damage to the premises.

  Option 2: Robbery only, inside and away from the premises, and resulting damage to the premises.

  Option 3: Burglary and safe burglary only and resulting damage to the premises.

  Option 4: Same coverages as in Option 1 but in varying amounts.

- Residential Crime Insurance Policy —

  To protect you against loss for up to $10,000 resulting from robbery or burglary of your home or apartment.

WHO IS ELIGIBLE?

- Now you can obtain affordable crime insurance from the Federal Insurance Administration of the United States Government that won't be cancelled or not renewed because of losses, if you live in:

  Connecticut, Illinois, Maryland, Massachusetts, Missouri, New York, Ohio, Pennsylvania, Rhode Island, Tennessee, or the District of Columbia.

HOW DO YOU BUY IT?

- Any licensed property insurance agent or broker in the above States and the District of Columbia can help you submit an application. Applications may also be obtained directly from the Servicing Company for your State:

  For Connecticut, District of Columbia, Massachusetts, Missouri, New York, and Ohio — Aetna Casualty & Surety Company.

  For Illinois, Maryland, Pennsylvania, and Tennessee — Insurance Company of North America.

  For Rhode Island — American Universal Insurance Company.

HOW MUCH DOES IT COST? — PREMIUMS ARE PAYABLE SEMI-ANNUALLY

- Residential crime insurance annual premiums vary according to crime rates in the city or town where you live:

	Annual Rates		
Coverage	Minimum	Average	Maximum
$1,000	$20	$30	$40
$3,000	$30	$40	$50
$5,000	$40	$50	$60
$7,000	$50	$60	$70
$10,000	$60	$70	$80

- Commercial crime insurance annual premiums vary according to class of business, city or town you live in, and annual amount of gross receipts:

For example:
For a drug store in Boston, Chicago, Cleveland, Hartford, Memphis, Philadelphia, Providence, or St. Louis, the annual premium (payable in semi-annual installments) is:

	With annual gross receipts of --		
	Under	$ 10,000-	$300,000-
Coverage	$100,000	$299,999	$499,999
Robbery insurance only (Option 2):			
$1,000	$ 60	$ 90	$120
$5,000	240	360	480
Burglary insurance only (Option 3):			
$1,000	$ 50	$ 75	$100
$5,000	200	300	400
Burglary and robbery insurance combined in equal amounts (Option 1):			
$1,000	$100	$150	$200
$5,000	400	600	800
Option 4: Insureds also may select combinations such as $5,000 burglary and $1,000 robbery at rates of	$500	$800	$920

INFORMATION SOURCE
Federal Insurance Administration
U.S. Department of Housing and Urban Development
451 - 7th St., S.W., Washington, D.C. 20410
Phone (202) 755-6555

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AUGUST 1972

Tenant Services Inc.
An Affiliate of Housing Innovations Inc

50 FRANKLIN STREET · BOSTON MASSACHUSETTS. 02110 426-5266

NOTICE OF TENANT CHARGES

Reference: Breakage

Due to the high costs of maintenance and repairs, residents will be charged (in part or full) for the repair, replacement, or mending of the items listed below if due to the negligence of residents, relatives, or quests. The charge for each item will depend upon cost and labor to repair the breakage.

Replacements	Charge		
Apartment door locks	$15.00		
Mailbox locks	$15.00		
Windows	*cost	plus	labor
Screens	*cost	plus	labor
Apartment door (negligence)	*cost	plus	labor
Wall repairs	*cost	plus	labor
Damaged garbage disposals	*cost	plus	labor
Stopped up toilets (negligence)	*cost	plus	labor
All other breakage as a result of tenant negligence.	*cost	plus	labor

*All cost plus labor charges will be reviewed by the Manager to insure the appropriate charges.

THE MANAGEMENT

Property Management

Tenant Services Inc.
An Affiliate of Housing Innovations Inc

50 FRANKLIN STREET · BOSTON MASSACHUSETTS 02110 426-5266

NOTICE OF TENANT CHARGES

Reference: Lock-Outs

Residents will be charged according to the list below in regard to Tenant Lock-Outs:

Days	Hours	Charge
Mondays thru Fridays	8:00 a.m. - 4:00 p.m.	$1.00 per lock-out
Mondays thru Fridays	4:01 p.m. - 10:00 p.m.	$5.00 per lock-out
Mondays thru Fridays	10:01 p.m. - 7:59 a.m.	$10.00 per lock-out
Saturdays, Sundays and Holidays	8:00 a.m. - 10:00 p.m.	$5.00 per lock-out
Saturdays, Sundays and Holidays	10:01 p.m. - 7:59 a.m.	$10.00 per lock-out

CARRY YOUR KEYS AT ALL TIMES

THE MANAGEMENT

Property Management

MEMORANDUM

TO: All Residents

FR: Management

RE: Holiday Security Measures

DT:

The Holiday season is approaching. Protect your apartment and valuables.

WHAT CAN YOU DO?

Engrave all appliances and belongings. Register with the police department (Tenant Services, Inc. has form and engravers). Display Ident - I - Guard decals on door and or windows. Decals will be issued upon return of engravers.

SAFE DEPOSIT BOX

Do not leave CASH, valuable jewelry or coins in your apartment. Rent a safe deposit box for a few dollars a year at any bank of your choice.

STORAGE

Store your furs. Pick them up when you wish to wear them, return them to storage after use. The rental cost you won't miss. The furs you will.

GIFTS

Change gift buying habits for those expensive Christmas gifts. Purchase gift certificates which can be purchased a few days before Christmas and hand delivered to relatives and friends.

INSURANCE

Purchase Federal Crime Insurance or Homeowner Insurance NOW.

Talk with neighbors and set up a building or apartment watch shifts. Form a mail committee of 2 or more persons to meet the postman and collect mail. Make arrangements with your individual postman.

ALERT

Call police immediately if you suspect a break in is in process or suspicious persons are on or around the premises.

Tenant Services Inc.

Do not open your apartment door for SALESMAN or STRANGERS.

WHAT CAN TENANT SERVICES, INC. DO?

Secure Entrances and Exits
Keep all entrance doors repaired and LOCKED
Keep all intercoms & buzzers functioning

Secure basement doors, windows and install mesh wire over first floor windows inside and outside where requested. Install metal plates on exterior basement doors. Install 6" heavy duty slide bolts for rear apartment doors.

CALL AHEAD

From November ___ - January __ you will receive a call to announce repairman coming.

APARTMENT & BUILDING REPAIRS

Residents will be notified of approximate time repairman will come. Each building should select one or two people to be alerted when workman will be in basement and public areas.

VACANCIES

Secure all vacant apartments while redecorating is in process. Re-occupy as soon as possible after apartment is ready for use.

LISTINGS & DIRECTORIES

Provide complete name listings on buzzers and mailboxes.

Tenant Services, Inc. will spend the next week going from building to building providing "What We Can Do" When are you going to start doing what you can do?

MANAGEMENT PLAN

EXHIBIT H

SAMPLE WORK ORDER

REQ. NO	APARTMENT NO.		
TODAY'S DATE	PHONE NO.	SERVICE REQUEST	ASSIGN TO

WE WERE IN YOUR APARTMENT TODAY TO SERVICE YOUR REQUEST

№ 160

- ☐ WE WERE ABLE TO REPAIR YOUR SERVICE REQUEST
- ☐ WE WERE UNABLE TO REPAIR THE PROBLEM FULLY
- ☐ WE HAD TO ORDER A PART
- ☐ WE HAD TO CALL AN OUTSIDE CONTRACTOR
- ☐ OTHER·

ADDITIONAL INSTRUCTIONS. _____

OFFICE COPY

THE WORK SHOULD BE COMPLETED BY. _____

COMPLETED BY: _____

MANAGEMENT PLAN

EXHIBIT I

TENANT SERVICES INC.

Date: _____

Sorry We Missed You

at _____ a.m./p.m.

We wanted to service, check or repair items checked:

___ Air Conditioner ___ Gas Range

___ Dishwasher ___ Heating System

___ Disposal ___ Plumbing System

___ Electrical System ___ Other

Call our Maintenance Office at 442-6806
to schedule an appointment
between 8:00 a.m. – 4:00 p.m., Monday-Friday

Refer to Work Order Number _____
when you call.

Signed _____
Tenant Services, Inc.

MANAGEMENT PLAN

EXHIBIT J

MAINTENANCE TELEPHONE SURVEY

Tenant Services Inc.

COPIES TO: MYA, DAB, RVD, PAP, CPR, TSM, ECC, LKC, SC, CQ, DW, JJ, CHRON

W.O.'s SENT		W.O.'s RECEIVED	
ROXBURY---------	38	ROXBURY---------	68
F.P.A.----------	15	F.P.A.----------	24

TOTAL COMPLAINTS---------- 53

MAINTENANCE TELEPHONE SURVEY

Week of April 9, 1979

TENANT'S NAME	ADDRESS	W.O.# PHONE #	COMPLAINT	W.O. RET.'D	SIGNED BY: ASSIGNED TO:	W.O. COMPLT.'D	RESPONSE TIME	MEN'S BEHAVIOR	TENANT'S COMMENTS
ELOISE YOUNG	19 Normandy St. #2	#025605 445-4865	Buzzer doesn't work on entrance door-check to see if door locks	4/6/79	not signed Johnnie	4/5/79	one day	Satisfactory	Satisfactory work
HORACE KINCAIDE	181 Magnolia St #1	#021126 427-4741	Bathtub leaks	3/29/79	not signed Alvin	3/28/79	one day	Very Nice	Good Work
SHARON SHEPHERD	44 Whitfield St. #20	#021249 265-0747	Broken Storm Window	4/3/79	not signed Buster	4/2/79	12 days job started on 3/19/79	Excellent	Satisfactory Very good work
MRS. MCTAGGART	140 Crawford St. #1	#025603 445-6683	replace top lock on front door	4/11/79	not signed Buster	4/6/79	two days	Good	Very good work
DOROTHY PERRY	237 Quincy St. #1	#021059 427-6366	Oven smoking	4/4/79	not signed Greene (appl. service man)	not indicated	w.o. sent on 3/19/79 job started 3/20/79	Good	Everything is O.
DOREEN HICKS	36 Cunningham St #1	#021119 427-2430	Garbage Disposal out of order	4/2/79	Tenant signed Alvin	3/28/79	one day	Good	Satisfactory wo
KENNETH BUDD	78 Intervale St. #3	#021125 427-4741	needs plastering work done	4/2/79	Tenant signed John R.	3/29/79	one day	Very good	Very Good work Tenant very pleased

SECOND SHEET

MAINTENANCE TELEPHONE SURVEY

Week of April 9 con't.

TENANT'S NAME	ADDRESS	W.O.# PHONE #	COMPLAINT	W.O. RET.'D	SIGNED BY: ASSIGNED TO:	W.O. COMPLT.'D	RESPONSE TIME	MEN'S BEHAVIOR	TENANT'S COMMENTS
NAZERIE SMITH	136 Seaver St. #10	#021081 442-4694	1) Stove fan not working 2) balcony door needs screw for lock	3/23/79	not signed Buster	3/21/79	one day	Very Good	Good work Never has any problem Always good wor

- Income and Expenses
- Rent Collection
- Exterior and Interior Appearance
- Accounts Payable
- Tenant Selection
- Vacancy Status
- Tenant Satisfaction with respect to Maintenance and Janitorial Services.

Monthly indices reports will also be done on this development by the Assistant to the President for review by the Owner, Director of Property Management and Regional Property Manager. We have enclosed as Exhibit A an indices report for our development in Springfield. The Assistant to the President, by means of these reports, can report immediately to the Owner if there are any problem areas within management.

E. Responsibility of Social Services.

The Property Manager and the project staff will be responsible for working with any existing social service program and developing a full social service program which in its broadest terms will include coordination of recreational activities for the residents of the development, establishment of a resident organization and coordination of activities and meetings to keep residents informed of social, recreational services that are available in their community. Regarding the social services, the Property Manager will be responsible for referring residents to the appropriate agencies.

F. Responsibilities of the Sponsor and the Managing Agent.

The Sponsor, as explained above will only be responsible in establishing management policies and reviewing project budgets and monthly indices for the development. In addition, the Sponsor will monitor the performance of the management agent on an intensive basis during the first year of operations and on a less intensive, but regular basis thereafter. The Management Agent, on the other hand, will be responsible for the day-to-day operation of the project. The Regional Property Manager will monitor the management operation by: (1) daily telephone contact with the Property Manager;(2) review of weekly reports regarding vacancy, tenant selection, expenses, maintenance which the Property Manager will be required to complete and forward to the Regional Property Manager;

TENANT SERVICES, INC.

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Introduction
Eligibility
TSI Staff
Hiring
Discrimination
Conditions Covering Employment
Classification of Employment
Work Hours
Evaluation
Organizational Structure
Conduct
Attendance
Change of Address
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Overtime/Payroll Changes
Personal Visitors
Compensatory Leave
Sick Leave
Military Leave
Bereavement
Jury Duty
Holidays
Vacations
Health Insurance
Life Insurance and Disability
MBTA
Education
Change of Status
Dismissal
Resignation
Job Description (enclosed)

INTRODUCTION

Tenant Services, Inc. (TSI) is a full service property management firm that specializes in the management of government subsidized low and moderate income housing for both profit and non-profit owners. The TSI approach to property management is based on the following key components:

- Efficient and prompt delivery of services with strong emphasis on responsive tenant relations.
- A fully computerized financial budgeting and reporting process that enables TSI to monitor and control expenses.
- A management system which quickly identifies and responds to problems and, if necessary, works through the various levels of government for their solution.
- An owner-oriented monthly reporting system which provides both a qualitative and quantitative picture of each development.

TSI services its clients by providing full computerized accounting services, janitorial, maintenance and administrative services. Rent-up of new developments and take over and restructuring of distressed properties have been a major function of the company. TSI not only fulfills the traditional role of managing agent, but also deals with the social issues of housing. Pre-occupancy and post-occupancy orientation sessions are held for new residents. Seasonal newsletters and events to promote resident involvement in management have been established with successful results.

ELIGIBILITY

The personnel policies described in this handbook are applicable to all staff members of Tenant Services, Inc. who have completed the probationary period satisfactorily and are considered permanent employees.

TSI STAFF

Administrative

a. Responsible for operation of TSI
b. Management Survey
c. Consulting of developments
d. Rent up and marketing
e. Resident Selection
f. Special services — resident orientations, promoting resident associations

Accounting Staff
Computing rent collection and all accounting needs

Janitorial Staff
Grounds care — exterior and interior landscaping

Maintenance Staff
Skilled — plumbing, heating, carpentry, painting, vacancy repair and general repair

HIRING

Applicants are required to complete an employment application. Preliminary screening of each application is done to insure eligibility for specific position. References of prospective candidates are checked. Applicants with satisfactory references are interviewed by the appropriate Supervisor who then recommends the final selections to Director. The Director conducts a second interview and gives final approval/disapproval of hiring.

)ISCRIMINATION

SI does not condone discrimination of any ind. Hiring and personnel practices are onducted independent of race, creed, color, ational origin, sex, age or marital status.

:ONDITIONS COVERING :MPLOYMENT

:lassification of Employment

'egular Full Time Employee: A regular full-me employee who has passed the proba-onary period of two months is employed for ɔrty (40) work hours or more per week.

'egular Part Time Employee: A regular part-me employee who has passed the proba-onary period and whose work schedule is ıirty (30) work hours per week or less.

'emporary Employee: A temporary employee /ho is hired for a specific period of time which may be full or part-time).

'robationary Employee: All newly hired mployees, regardless of position shall be ›n probation for the initial two (2) month ›eriod. At monthly intervals, evaluation ses-ions will be held with the employee and the Supervisor. If the employee's performance ınd/or attitude is evaluated as being below standard at any time during the probationary ›eriod, he/she will be dismissed immediately. This determination will be made by the Supervisor upon approval of the Director.

WORK HOURS

The workday for TSI administrative staff is 9:00 a.m. through 5:00 p.m.

The workday for TSI janitorial and mainte-nance staff is 8:00 a.m. through 4:00 p.m.

EVALUATION

All new employees are hired on a sixty (60) day trial basis. During this period your work and attendance will be evaluated by your Supervisor. Once the trial period is over, the Supervisor will prepare a written evaluation of the employee and make recommendation as to permanent status or dismissal to the Director. If permanent status is decided, employee will then be eligible to receive company benefits.

CONDUCT

Employees are expected to perform their functions in a manner reflecting credit to Tenant Services, Inc. and its goals and to conform to the rules and regulations set by TSI.

ATTENDANCE

Good attendance is a must in order for you to perform your assigned duties and for Tenant Services, Inc. to keep its high standing.

If you are going to be out or late due to illness or other personal reasons, you should inform the office either beforehand or on the particular day before 9:00 a.m.

CHANGE OF ADDRESS

All changes in your address and telephone number should be reported to your Supervisor immediately who in turn will inform the Accounting Department.

PAY DAY

The salaries of full and part-time employees will be on a weekly basis, payable on Thursday for the preceeding Saturday through Friday. Payment is always one week behind due to our computerized payroll system.

Upon termination from Tenant Services, Inc., the regular paycheck from the preceeding week plus any pay that is owed for the week of termination will be issued.

OVERTIME/PAYROLL CHANGES

Overtime must be authorized in advance by your Supervisor. Payroll is prepared for distribution on Thursday. All requests for overtime and/or payroll changes must be received by your Supervisor before 11:00 a.m. on Monday. Any additions received after 11:00 a.m. will be processed for the following week.

PERSONAL VISITORS

Conducting of personal social activity or personal business during office hours is discouraged. However, if a situation should arise, the business should be conducted briefly in the outer offices.

COMPENSATORY LEAVE

All employees are hired to do a job, and not just to put in a certain number of hours per day or week. This being so, it is recognized that a person or project may require work on the part of such employees beyond regular working hours.

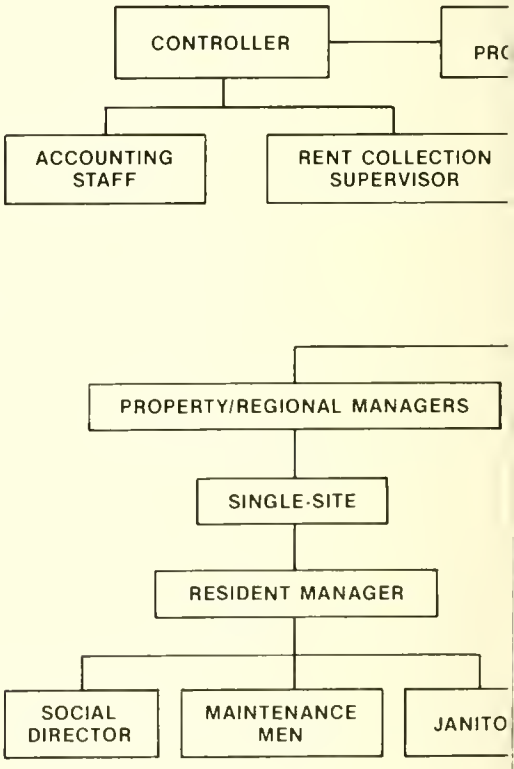
Request for Compensatory Leave should be submitted to the Director for approval and processing no later than ten (10) working days prior to the proposed leave period.

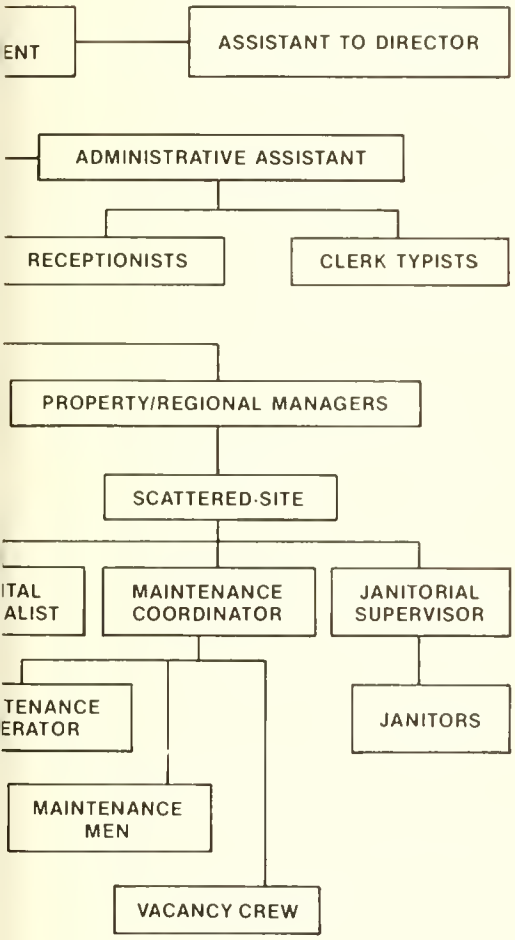
No employees shall receive cash in lieu of Compensatory Leave.

In no case shall an employee receive more than two (2) weeks compensatory leave within any single twelve (12) month period.

Unused compensatory time is *not* payable upon termination of employment.

ORGANIZATIONAL STRUCTURE




ENT
ASSISTANT TO DIRECTOR
ADMINISTRATIVE ASSISTANT
RECEPTIONISTS
CLERK TYPISTS
PROPERTY/REGIONAL MANAGERS
SCATTERED-SITE
ITAL
ALIST
MAINTENANCE
COORDINATOR
JANITORIAL
SUPERVISOR
TENANCE
ERATOR
JANITORS
MAINTENANCE
MEN
VACANCY CREW

SICK LEAVE

Sick leave with pay will not exceed ten (10) days per year. Sick leave is on a per-year basis, beginning the first day after your probationary period is up. Unused sick leave may accrue from year to year, but is not payable or due upon termination. If an employee has used his allotted days, those days in excess shall be deducted from the employee's forthcoming paycheck. In case of prolonged illness, a leave of absence will be granted.

If you are going to be out sick, you must notify your Supervisor within the first half hour of your regular starting time. Provided you have sick days available, you will be paid for the day and the sick day will be deducted from your accumulated sick days. If you do not call in to your Supervisor, you will not be paid for the day.

If you are out sick more than two consecutive days, you must submit written verification from a doctor that:

1) Illness required you to stay at home *X* number of days;
2) you may return to work and assume all duties as described in your job description.

If a doctor's slip is not submitted, you will not be paid for the days missed.

MILITARY LEAVE

1. The employee shall notify the Supervisor/Director in *writing* as to required leave.
2. The employee shall submit to his Supervisor a copy of the Official Orders, directing the employee to report for Military Duty.
3. Employees will not be paid for Military Duty.

BEREAVEMENT

Permanent employees will be paid up to three (3) days bereavement leave in the event of the death of a member of the immediate family, (i.e., spouse, parents, child, brother, sister or Grandparents). The Director will review requests over three days on an individual basis.

JURY DUTY

An employee called for jury duty will be paid the difference between jury duty compensation and his/her regular weekly pay. The employee is expected to report for work within a reasonable time and work the remainder of his scheduled work day if dismissed from Jury Duty.

HOLIDAYS

TSI employees observe eleven (11) paid holidays per year.

New Year's Day	January 1
Martin Luther King's Birthday	January 25
Washington's Birthday	February 22
Patriot's Day	April 14
Memorial Day	May 30
Independence Day	July 4
Labor Day	September, first Monday
Columbus Day	October 12
Veteran's Day	November 12
Thanksgiving Day	November, last Thursday
Christmas Day	December 25

VACATIONS

All vacation requests must be approved by the Director. The vacation period extends from May 1st through October 31st for all field and site office staff. Vacation requested

at any other time must have permission of Director. Special requests will be evaluated on an individual basis.

Who Is Eligible

a. All full time (40 hr. week) personnel who have been with the Company a full year will be eligible for a two week vacation (10 days) with pay. No paid vacation will be approved prior to the first anniversary date.

b. All full time (40 hr. week) personnel who have been with the Company for two years and over will receive a day per month vacation which equals 12 days per year.

c. All full time personnel who have been with the Company for less than a year may request up to two weeks vacation *without pay* subject to the Director's personal approval on an individual basis.

d. All part time employees who have been with the Company one year or more are eligible for one week with pay.

e. Employees whose anniversary date with the Company falls prior to May 1st or after October 31st will be eligible for vacation within the designated vacation period.

Accrued Paid Vacation Time

Vacation time will not be permitted to accrue. Each employee must take a vacation. No one will be permitted to collect vacation pay and also work.

If you do not take the time then you will lose the time.

Vacation Requests

Vacation schedules will be prepared by April 15 of every year. Each eligible employee must submit a completed vacation form at that time. Any employee failing to submit a request will receive no priority in selection of vacation time.

Vacation Pay

The payroll department must be informed of the planned vacation on the Monday *before* the vacation begins in order to prepare vacation pay checks. Otherwise, vacation pay will be held until your return.

EDUCATION

Seminars & Workshops

TSI will from time to time request staff persons to attend Housing related Seminars & Workshops. TSI will pay all fees (and travel according to travel allowance schedule) required.

Staff persons desiring to attend Seminars & Workshops must get Director's approval prior to enrollment if course is during the work week. Approval will be based on the criteria described below.

Extended Courses

Director's approval is needed prior to enrollment. Out of town travel other than by auto will be on a per case basis. No course will be approved unless it meets the following criteria:

1. Course must be directly related to staff person's position and duties.
2. Course material of such nature it can be put to use immediately, and/or qualify staff person for a professional standing or designation which can be of value to TSI.

Staff persons will be required to pay for the course. Upon completion and receiving a passing grade of C or better TSI will reimburse the person according to agreement reached between the staff person and the Director.

Affiliations, Professional Membership, Dues & Periodicals

TSI will pay dues and fees for any managerial staff whose affiliation is of value to TSI as a Property Management Firm.

Project Travel: Any travel undertaken which is on project business must have Director's approval and will be paid for by TSI.

CHANGE OF STATUS

Change of Status forms are used for promotions, salary increases, transfers and termination. If a Change of Status involves a title change, a job description of the new position must be attached.

HEALTH INSURANCE

TSI provides employees with the choice of two health insurance policies to help serve your needs and pays 75% of premium for all permanent employees.

Harvard Community Health Plan
Connecticut General Life Insurance

LIFE INSURANCE AND DISABILITY

TSI provides employees with a $5,000.00 life insurance policy and disability income of 60% of your salary through age 65.

MBTA

The MBTA voluntary pass program is payroll deductible and designed for your benefit providing fast, convenient access to the Transit System. The convenience of the PASS

eliminates the inconvenience of exact change for fares. Also, you will have the satisfaction of knowing you are contributing to Energy Conservation.

DISMISSAL

An employee who has been notified of dismissal will receive a warning slip beforehand. Each time a warning slip is issued, it in turn goes into the employee's file along with his evaluation report and becomes a part of his permanent record. At the time of dismissal, any money owed will be paid.

RESIGNATION

In the event of resigning from the company, the employee must give written notice at least two (2) weeks prior to the date of leaving. This allows time for a job replacement and time for the payroll department to prepare any vacation pay which has accrued (if any) during your employment.

JOB DESCRIPTION

A job description is enclosed, describing your assigned duties and responsibilities.

VELCOME TO TENANT SERVICES, INC.

Tenant Services, Inc. has the right to require each employee to subscribe to the basic philosophy of the Company, and to adhere to its policies, goals, functions and guidelines.

NILES COMPANY, INC.

The principal-in-charge at Niles Company, Inc. will be Shepard Brown. Shepard Brown is a Senior Vice President of Niles Company, Inc., with thirty years of property management experience. He is a past President of the Rental Housing Association of the Greater Boston Real Estate Board, as well as President of the Real Estate Board itself. He is a past President of the New England Chapter of the Institute of Real Estate Management, as well as being Governor of the Institute.

1. (a) Attached is a list of all residential property under Niles management for the previous three years with the required information.

   (b) The Niles management contract for Concord Greene expired December, 1981, because the original owner of the property, who had sold the property to the condominium development entity took the property back and decided to manage the property himself.

   The Niles management contract for Strathcona Condominium expired in Spring, 1982, because the condominium trustees decided to give the contract to another company.

The Niles management contract for Ferncroft Village expired in Fall, 1980, because of change of trustees who preferred another management company.

The Niles management contract for the Prudential Apartments expired in June, 1982, because the Prudential Insurance Company engaged a Chicago company to market the entire apartment complex as a Cooperative and to manage it during the process.

The Niles maanagement contract for Pinegrove Village expired in June, 1982, because both management and the directors of the Cooperative decided the small project could be managed more cost effectively by a smaller management company.

2. To the knowledge of Niles Company, Inc., there is or has been no litigation pending or adjudicated against the company relating to the financial aspects of management, alleged discrimination in hiring, tenant selection or tenant relationships during the last few years; however a former employee of the Niles Company has recently filed an administrative charge of discrimination with the Massachusetts Commission Against Discrimination concerning her employment by the Niles Company. The Niles Company believes there is no merit to this claim.

3. N/A

4. Niles Company, Inc. has fourteen property managers. Of these, two are Certified Property Managers in the Institute of Real Estate Management, and two are Candidates for the CPM designation:

Shepard Brown, CPM, Senior Vice President. Responsible for property management consulting and development of new management business.

Donal Sisk, CPM, Senior Vice President. Manager of four garden complexes having 179, 118, 64 and 99 units. Also manager of two high-rise urban apartment buildings, having 260 and 140 units. Also supervisory manager of 789 unit garden complex.

Thomas H. Niles, Candidate. President of the Company.

Charles Moran, Candidate. Vice President. Manager of two condominium complexes of 164 and 144 units; two rental complexes of 63 and 25 units; three small office buildings; supervisor of New Hampshire office.

5. NILES COMPANY, INC. PERSONNEL POLICY

Policy - The Personnel Policy at Niles Company has been to hire administrative, clerical, professional and service personnel according to the abilities demonstrated for the job at hand, without regard to race, creed, color or sex.

On-Going Commitment -

A. Niles Company will continue to hire personnel, as needed, of all job classifications, on an non-discriminatory basis. It is the policy of Niles Company to promote from within, particularly among the building service workers, where the greatest number of minorities are employed. This practice encourages the learning of new skills and striving to achieve higher levels of responsibility.

B. In the case of a vacancy among the service workers, clerical staff and administrative positions, the steps taken to hire a replacement are on a equal opportunity basis. The job is and will be described and advertised in the newspaper of greatest local readership and circulation, and applicants with the proper qualifications are interviewed.

Responsibility - Within Niles Company, the executive in charge of the management department, the executive committee, and the President of the company are all aware of this Personnel Policy Program and all bear the responsibility to see that it is carried out.

NILES COMPANY, INC.

PROPERTIES UNDER MANAGEMENT OF NILES COMPANY, INC.
1980 THROUGH 1982

NAME: NA
OWNER: Mary Niles and Estate of L.F. Niles
LOCATION: 1197-1209 Boylston Street, Boston
TYPE OF SITE: Urban
TYPE OF CONSTRUCTION: Brick
INCOME AND SUBSIDY MIX: All market rate
NUMBER AND SIZE OF UNITS: 122 1 and 2 Bedroom
FINANCING: None
MORTGAGE STATUS: NA
SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA
OWNER: Co-op
LOCATION: 101 Chestnut Street, Boston
TYPE OF SITE: Urban
TYPE OF CONSTRUCTION: Brick
INCOME AND SUBSIDY MIX: NA
NUMBER AND SIZE OF UNITS: 19 Large units
FINANCING: NA
MORTGAGE STATUS: -
SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA
OWNER: Boston Safe Deposit & Trust
LOCATION: 319 Huntington Ave., Boston
TYPE OF SITE: Urban
TYPE OF CONSTRUCTION: Brick
INCOME AND SUBSIDY MIX: All market rate
NUMBER AND SIZE OF UNITS: 46 1 and 2 bedroom
FINANCING: NA
MORTGAGE STATUS: NA
SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: Boston Safe Deposit & Trust

LOCATION: 337-339 Huntington Avenue, Boston

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 62 1 and 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: Bowdoin Properties

LOCATION: 13-27 Bowdoin Street, Boston

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 63 Efficiency and 1 Bedroom

FINANCING: HUD 221(d)4

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: Condo

LOCATION: 191 Commonwealth Avenue, Boston

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 16 Large units

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Charlesbank Apartments

OWNER: Charlesbank Homes, Inc.

LOCATION: 650 Huntington Avenue, Boston

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate (within HUD limits)

NUMBER AND SIZE OF UNITS: 260 Efficiency and 1 Bedroom

FINANCING: HUD 221(d)4

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Franklin Square House

OWNER: Charlesbank Homes, Inc.

LOCATION: 1575 Tremont Street, Boston

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate (within HUD limits)

NUMBER AND SIZE OF UNITS: 147 1 and 2 Bedroom

FINANCING: HUD 203

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: Condo

LOCATION: 330 Beacon Street, Boston

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 81 1 and 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: Mary Niles and Estate of L.F. Niles

LOCATION: 15-29 Colliston Road, Brighton

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 28 1 and 2 Bedroom

FINANCING: None

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: Mary Niles and Estate of L. F. Niles

LOCATION: 286-288 Chestnut Hill Avenue, Brighton

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 50 1 and 2 Bedroom

FINANCING: None

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: North Coast Properties, Inc.

LOCATION: 1185-1197 Commonwealth Avenue, Brighton

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 96 1 and 2 Bedroom

FINANCING: Conventional

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: North Coast Properties, Inc.

LOCATION: 36-44 Quint Avenue, Allston

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 47 1 and 2 Bedroom

FINANCING: None

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: Evergreen Associates

LOCATION: 89-97 Chester Street, Allston

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 42 Efficiency, 1 and 2 Bedroom

FINANCING: Conventional

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Louisburg Square South

OWNER: Condo

LOCATION: Quincy Shore Drive, Quincy

TYPE OF SITE: Suburban rowhouse

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 52 Large duplexes

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Independence Condominium

OWNER: Condo

LOCATION: 195-205 Independence Avenue, Quincy

TYPE OF SITE: Suburban mid-rise

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 80 1 and 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Sagamore Place

OWNER: Condo

LOCATION: 115 West Squantum Street, Quincy

TYPE OF SITE: Suburban high-rise

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 212 Efficiency, 1 and 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Imperial Towers

OWNER: Condo

LOCATION: 280 Boylston Street, Chestnut Hill

TYPE OF SITE: Suburban high-rise

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 152 1 and 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: Mary Niles and Estate of L.F. Niles

LOCATION: 136-138 Highland Avenue, Somerville

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 66 1 and 2 Bedroom

FINANCING: Conventional

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Westbrook Village

OWNER: John Hancock

LOCATION: VFW Parkway, West Roxbury

TYPE OF SITE: Suburban garden rowhouse

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 789 1,2 and 3 Bedroom

FINANCING: Long Term Purchase and Sale Agreement

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Lakeview Gardens

OWNER: North Coast Properties, Inc.

LOCATION: Natick

TYPE OF SITE: Suburban garden apartments

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 179 1 and 2 Bedroom

FINANCING: Conventional

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Charles Court East

OWNER: Condo

LOCATION: Needham

TYPE OF SITE: Suburban garden apartments

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 118 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Linden Square

OWNER: North Coast Properties, Inc.

LOCATION: Linden Street, Wellesley

TYPE OF SITE: Suburban rowhouse

TYPE OF CONSTRUCTION: Wood

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 64 2 Bedroom

FINANCING: Conventional

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Jericho Village

OWNER: North Coast Properties, Inc.

LOCATION: Weston

TYPE OF SITE: Country rowhouse

TYPE OF CONSTRUCTION: Wood

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 99 2 and 3 bedroom

FINANCING: Conventional

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: The Vendome

OWNER: Condo

LOCATION: 160 Commonwealth Avenue, Boston

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 138 Efficiency and 1 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Prudential Apartments

OWNER: Prudential Insurance Co.

LOCATION: Prudential Center, Boston

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 781 1,2,3 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Coburn Woods

OWNER: Condo

LOCATION: Nashua, New Hampshire

TYPE OF SITE: Country detached houses

TYPE OF CONSTRUCTION: Wood

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 220 2 and 3 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Concord Greene

OWNER: Condo

LOCATION: Concord, Mass.

TYPE OF SITE: Country rowhouse

TYPE OF CONSTRUCTION: Wood

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 220 1 and 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Strathcona

OWNER: Condo

LOCATION: 992 Memorial Drive, Cambridge

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 36 2 and 3 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Pinegrove Village

OWNER: Co-op

LOCATION: Worthen Road, Lexington

TYPE OF SITE: Country rowhouse

TYPE OF CONSTRUCTION: Wood

INCOME AND SUBSIDY MIX: 4 low income, balance middle income and market rate

NUMBER AND SIZE OF UNITS: 16 2,3,4 Bedroom

FINANCING: MHFA

MORTGAGE STATUS: Current (as far as I know)

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: The desired social balance was achieved in rent-up

NAME: Hawthorne's Crossing, Swampscott

OWNER: Condo

LOCATION: Loring Avenue, Swampscott

TYPE OF SITE: Country rowhouse

TYPE OF CONSTRUCTION: Wood

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 150 2 Bedroom townhouses

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Ferncroft Village

OWNER: Condo

LOCATION: Danvers, Mass.

TYPE OF SITE: Country high-rise

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS:

FINANCING: 177 1 and 2 Bedroom

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: North Coast Properties, Inc.

LOCATION: 195 Thomas Burgin Parkway, Quincy

TYPE OF SITE: Suburban mid-rise

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 62 1 and 2 Bedroom

FINANCING: Conventional

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Wood Ridge

OWNER: Co-op

LOCATION: Wood Ridge Drive, North Andover

TYPE OF SITE: Country garden rowhouse

TYPE OF CONSTRUCTION: Wood

INCOME AND SUBSIDY MIX: 17% market, 78% low and moderate income

NUMBER AND SIZE OF UNITS: 230 1,2,3 and 4 Bedroom

FINANCING: MHFA

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: Affirmative goals met during rent-up

NAME: NA

OWNER: Mary Niles

LOCATION: 36-44 St. Paul Street, Brookline

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 32 1 and 2 Bedroom

FINANCING: None

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: North Coast Properties, Inc.

LOCATION: 72-74 Kirkland Street, Cambridge

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 31 1 and 2 Bedroom

FINANCING: None

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: North Coast Properties, Inc.

LOCATION: 1558 Massachusetts Avenue, Cambridge

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 30 Large 2 and 2 Bedroom

FINANCING: Conventional

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: North Coast Properties, Inc.

LOCATION: 1610-1622 Massachusetts Avenue, Cambridge

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 50 1 and 2 Bedroom

FINANCING: Conventional

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: North Coast Properties, Inc.

LOCATION: 28-30 Langdon Street, Cambridge

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 33 1 and 2 Bedroom

FINANCING: Conventional

MORTGAGE STATUS: Current

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Continental Gardens

OWNER: Condo

LOCATION: 14 Garden Street, Cambridge

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 48 1 and 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: Leslie Read

LOCATION: 9 Dana Street, Cambridge

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 25 1 and 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: Leslie Read

LOCATION: 37-41 Wendell Street, Cambridge

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 32 1 and 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: New England Mutual Life Insurance Company

LOCATION: 100 Memorial Drive, Cambridge

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 264 1,2,3 Bedroom

FINANCING: None

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: Condo

LOCATION: 1105 Massachusetts Avenue, Cambridge

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 90 1 and 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Barrington Court

OWNER: Condo

LOCATION: 898 Memorial Drive, Cambridge

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 86 2 and 3 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: NA

OWNER: North Coast Properties, Inc.

LOCATION: 353 Harvard Street, Cambridge

TYPE OF SITE: Urban

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: All market rate

NUMBER AND SIZE OF UNITS: 25 1 and 2 Bedroom

FINANCING: None

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Colonial Village

OWNER: Condo

LOCATION: Arlington

TYPE OF SITE: Suburban low-rise

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 144 1 and 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

NAME: Melrose Towers

OWNER: Condo

LOCATION: Melrose

TYPE OF SITE: Suburban mid-rise

TYPE OF CONSTRUCTION: Brick

INCOME AND SUBSIDY MIX: NA

NUMBER AND SIZE OF UNITS: 164 2 Bedroom

FINANCING: NA

MORTGAGE STATUS: NA

SUCCESS IN ACHIEVING
AFFIRMATIVE MARKETING PLANS: NA

CONTRACTOR QUALIFICATIONS

4. CONTRACTOR

1. Barkan Construction Company has an annual bonding capacity of $45 million.

2. To date, Barkan Construction Company has successfully constructed over 3500 units of apartment and condominium projects including:

Housing for the Elderly	Plymouth, Mass.
Housing for the Elderly	Revere, Mass.
Jewish Community Housing I	Brighton, Mass.
Jewish Community Housing II	Brighton, Mass.
1550 Beacon Street	Brookline, Mass.
Concord Housing	Boston, Mass.
Forbes Building	Jamaica Plain, Mass.
St. Stephen's Housing	Lynn, Mass.
North Shore Jewish Housing	Lynn, Mass.
Northfield Green	Portland, Maine
120 Center Street	Brookline, Mass.
Jewish Community Housing II	Brighton, Mass.
HRCA Elderly Housing	Revere, Mass.
Congressional Homes III	Melrose, Mass.
Oak Park	Lewiston, Maine
100 State Street	Portland, Maine
Arlington Park	Lawrence, Mass.
Florence Mill	Vernon, Conn.
Cotton Mill	Hallowell, Maine
Valebrook Housing	Lawrence, Mass.
New Falls Housing	Newton, Mass.
Fitchburg Green	Fitchburg, Mass.
Berger Apartments	New Haven, Conn.
Marble Street Apartments	Worcester, Mass.
Glastonbury Homes	Glastonbury, Conn.

Dockside Place	Boston, Mass.
Horizon Homes	Reading, Mass.
Dempsey Apartments	Macon, Georgia

Letters of reference will be provided.

3. Barkan Construction Company has enacted policies of equal employment opportunity and affirmative action that have led to significant employment and contracting opportunities for minorities and females on its construction jobs, as evidenced by the achievement documented on the accompanying sheets for five recent projects.

We are famililar with BRA/BHA's Equal Opportunity/Affirmative Action Program and will work with the partnership to establish meaningful and achievable goals for minority and female employment as well as contracting opportunities for minority and female owned enterprises on this project.

We recognize the potentially positive economic impact that this project will have on the City of Boston and the Columbia Point neighborhood. We will endeavor to do business with local subcontractors and suppliers, and pledge to develop a training/work program for a number of residents of Columbia Point.

As part of our final proposal for the Columbia Point Penninsula project, we will outline a specific plan to achieve the EEO/minority goals of the BHA/BRA.

E.E.O.: PAST PERFORMANCE

Project/Location	Category	Goal	Achieved
1. Berger Apartments New Haven, CT			
% minority hours:	Barkan	20%	44%
	Subcontractors	20%	27%
	Total	20%	32%
% female hours:	Barkan	6.9%	10%
	Subcontractors	6.9%	6%
	Total	6.9%	7%
% minority contract $'s			5.1%

E.E.O.: PAST PERFORMANCE

Project/Location	Category	Goal	Achieved
2. Viviendas Boston, MA			
% minority hours:	Barkan	30%	28%
	Subcontractors	30%	26%
	Total	30%	27%
% female hours:	Barkan	6.9%	5%
	Subcontractors	6.9%	6%
	Total	6.9%	6%
% minority contract $'s			3%
3. Valebrook Lawrence, MA			
% minority hours:	Barkan	18%	28%
	Subcontractors	18%	19%
	Total	18%	20%
% female hours:	Barkan	6.9%	0%
	Subcontractors	6.9%	2%
	Total	6.9%	2%
% minority contract $'s			4.5%
4. Fitchburg Green Fitchburg, MA			
% minority hours:	Barkan	8%	15%
	Subcontractors	8%	11%
	Total	8%	12%
% female hours:	Barkan	6.9%	10%
	Subcontractors	6.9%	0%
	Total	6.9%	2%
5. Marble Street Worcester, MA			
% minority hours:	Barkan	8%	10%
	Subcontractors	8%	12%
	Total	8%	11%
% female hours:	Barkan	6.9%	7%
	Subcontractors	6.9%	0%
	Total	6.9%	2%
% minority contract $'s			3.2%

4. Barkan Construction Company has no past or present litigation in which it was alleged or found to be liable for construction deficiencies.

   Likewise, no debarments, suspensions or denials of participation resulting from construction defects not satisfactorily corrected.

BARKAN

January -, 1982

EQUAL OPPORTUNITY IN EMPLOYMENT

PROGRAM OF AFFIRMATIVE ACTION

A. Policy

In recognition of our moral commitment to the advancement of all Minority Groups, this Company will not discriminate against any employee or applicant for employment because of race, creed, color, national origin or sex.

B. Equal Employment Opportunity Officer

G. Gladstone has been appointed as the Equal Employment Opportunity Officer to co-ordinate Company efforts in connection with our commitment to encourage the employment and development of Minority Groups. Mr. Gladstone may be reached by calling our Boston office at 617-734-9600.

The Equal Opportunity Officer oversees non-discriminatory hiring and lay-off by being the final voice in such matters.

Should any discriminatory complaint ever occur, the Equal Opportunity Officer has been directed to arbitrate any such matters without prejudice.

C. Recruiting Practices

In accordance with our established policy, advertisement for employment, when required, has been, and shall continue to be, placed in the newspapers which serve the largest number of Minority Group people in the recruiting area as well as the principal newspapers which serve the area.

To this end, we have placed advertisements for employment in several minority newspapers and shall continue to use these media when required in seeking to fill positions in both the field and in the office.

We have actively sought to employ office personnel by contacting agencies dealing with Minority Groups and Women. In addition, when placing orders with Employment Agencies for office or field personnel, such agencies shall continue to be advised that we are an Equal Opportunity Employer and would welcome applicants from Minority Groups & Women.

Advertisements for employment placed in all newspapers bear the label "Equal Opportunity Employer" including advertisements seeking Construction Superintendents.

All bulletin boards on Job Sites shall continue to bear job availability and equal opportunity label, and Job Superintendents are instructed to make our Equal Opportunity in Employment Policy known to each of the Union Business Agents who are contacted for employees. This policy shall apply equally to Apprentices and to Journeymen.

All office and field personnel are encouraged to refer Minority and female applicants for available positions, feeling confident that the applicants' qualifications will be judged without regard to sex, race, creed, color or national origin.

D. Nondiscriminatory Placement and Promotion

It is a matter of Company policy that work assignment and promotion shall be made without discrimination as to sex, race, creed, color, and national origin. Insofar as possible, every effort shall be made to encourage Minority Group and female employees to seek such promotion.

As we have in the past, we shall employ Minority Group and female personnel in supervisory positions and continue to promote them when warranted. The Company policy has always been that there shall be no varying rates of pay except by trade classification and Union ruling, and there shall be no deviation from this policy.

E. Nondiscriminatory Demotion, Layoff and Termination

The Company policy with respect to placement and promotion shall apply equally to the matters of demotion, layoff, and termination.

F. Additional Nondiscriminatory Action

The Company policy applying to non-variance in rates of pay except by trade classification and Union ruling is checked each week at the time payrolls are made out. There is no on-the-job setting of wage rates. An individual is paid by the office automatically by trade class and Union ruling, the payroll clerk having no knowledge of the sex, race, creed, color or national origin of the employee.

In the Office, an employee is paid on the basis of the type of position and the current popular wage rate for a similar position elsewhere in the industry, varying only in length of experience, qualifications, and ability. No deviation from this policy is allowed on the basis of sex, race, creed, color or national origin.

No existing employees' compensation has ever been reduced because of converting to on-the-job-trainee status, and this policy shall continue.

As in the past, the Company policy shall continue to be to offer an opportunity to all qualified employees to perform overtime work when required without regard to sex, race, creed, color, or national origin.

At the regular Job-site meetings, each Superintendent will emphasize the Company's earnest desire that this Program shall be carried through. The Executive Vice President shall verify that no discrimination exists in the Field, and shall report his finding to the Equal Employment Opportunity Officer, together with any recommendations for additions or alterations to the Program as required to obtain the desired results.

G. Nondiscriminatory Practice in Sub-Contracts

The policy of the Company shall continue to be to encourage the advancement of Minority Groups and women by soliciting sub-contractor bids without discrimination. Additionally, we seek to repeat contracts with sub-contractors who evidence their sincere desire to participate in an Equal Opportunity in Employment Program by hiring Minority Group and female employees.

Minority and women's entrepreneurship is encouraged by soliciting competitive proposals from such qualified business groups and by extending every effort to induce such participation.

Mel A. Barkan
President

MAB:CD

Directed to: All Job Superintendents
Office Personnel
Office Manager
File

1

4

8

Cover

CRW Realty
University Office Park
Jung/Brannen Associates

Harvard Medical School
Seeley G. Mudd Building
The Architects Collaborative

Julian Cohen and Daniel E. Rothenberg
The Mall at Chestnut Hill
Sumner Schein & Jung/Brannen

Valebrook Associates
Valebrook Housing
Gelardin, Bruner, Cott, Inc

Inside Photographs

1&8 Harvard Medical School
Seeley G. Mudd Building
The Architects Collaborative

2 Boston Properties
Atlantic Monthly Building Rehabilitation
Childs, Bertman, Tseckares & Casendino, Inc

3 Hebrew Rehabilitation Center for the Aged
Revere House
Stull Associates, Inc.

4 Amicon Corporation
Sullivan Design

5 Park Street Church
New Ministries Building
Stahl Associates, Inc.

6 Peter Bent Brigham Hospital
Surgical Building
Bertrand D. Goldberg & Associates

7 Harvard University
Canaday Hall
Ezra D. Ehrenkrantz

9 Boston Properties
Hayden Office Trust
Symmes, Maini and McKee

10 Harvard Community Health Plan
Kenmore Center
Steffian Bradley & Associates, Inc.

11 Julian Cohen and Daniel E. Rothenberg
The Mall at Chestnut Hill
Sumner Schein & Jung/Brannen

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Human resources create business success.

At The Barkan Companies we emphasize human resources and offer our clients the commitment of a dedicated team of professionals experienced in all aspects of facilities planning and construction.

We offer you innovative people who will face challenges head-on and deliver to you a quality facility built on time and within budget. The building solutions which we recommend will stress value as a principal objective. Our corporate growth and financial strength depend upon our ability to satisfy your needs in a responsive and cost-effective manner.

As President, I encourage our people to adopt a problem-solving attitude on every project we undertake. The "Barkan Approach" has been, and will continue to be, one of integrity, performance and value.

This brochure is a testimonial to our people and their accomplishments. I am most proud of these achievements and look forward to our future with great enthusiasm.

Miles Barkan

Management

Mel A. Barkan
President
The Barkan Companies

Mel A. Barkan is President and Chief Executive Officer of Barkan Construction Company, Barkan Properties and Barkan Management Company. Prior to founding Barkan Construction Company in 1964, Mr. Barkan held senior management positions in two other local construction firms.

Warren R. Meier
Executive Vice President
Barkan Construction Company

Warren R. Meier has served as Vice President and Senior Project Manager for Barkan Construction Company since 1965. Mr. Meier started his construction career with Beacon Construction Company and over the last 25 years has held various supervisory and management positions within the industry.

Gordon Gladstone
Treasurer
The Barkan Companies

Gordon Gladstone, Treasurer and Chief Financial Officer of The Barkan Companies, is a Certified Public Accountant and member of the Massachusetts Bar Association. As a manager with the national accounting firm, Laventhol & Horwath, he specialized in the real estate and construction industries.

Louis N. Garfield
Vice President
Barkan Properties

Louis N. Garfield is Vice President and Chief Operating Officer of Barkan Properties and directs The Barkan Companies' real estate development effort. Mr. Garfield obtained extensive experience in real estate development with International Paper Company and has held management positions with General Electric Company and Litton Industries.

Zezette Larsen
President
Barkan Management Company

Zezette Larsen is President and Chief Operating Officer of Barkan Management Company which is the property management division of The Barkan Companies. Prior to joining Barkan, Mrs. Larsen served for eight years as Executive Director of the Jewish Community Housing for the Elderly Organization.

Robert E. Cronin
Vice President
The Barkan Companies

Robert E. Cronin is Vice President of Marketing for The Barkan Companies. Mr. Cronin has 12 years of marketing experience in the design/engineering, construction and real estate development industries. Most recently he served as a Vice President of Marketing for the Carlson Corporation.

Services

General Contracting

Barkan Construction Company has been a General Contractor since 1964 Throughout our history, we have maintained a reputation for building a quality product at a competitive price We have an excellent record for completing jobs on time, within budget and to the complete satisfaction of our clients.

To date, we have constructed projects valued in excess of $435 million. Although the scope and character of these projects have varied, our corporate guidelines have remained unchanged to provide maximum value; value to our clients in terms of quality of product and services rendered; and value to our people in the form of professional challenge and opportunity.

Construction Management

As Construction Manager of your project, we will work in close cooperation with you and your architect to provide a complete construction management service Our in-house team of specialists perform value engineering, design review, cost analysis, scheduling, purchasing, accounting and field supervision to ensure that your project achieves its goal.

Major benefits of our construction management approach include a truly *Competitive Bidding* process, a *Fixed Fee* contract, and a *Guaranteed Maximum Price* which is agreed upon when sufficient plans and specifications are developed In addition, added savings can be realized by employing a *"Fast-Track"* project schedule This process actually compresses the schedule by overlapping the design and construction phases of the project. The results—earlier occupancy, lower overhead and shorter-term financing

Design / Build

As Design/Builder of your project, we are prepared to assume responsibility for all aspects of your building program from initial site selection and conceptual planning through financial consulting, design, engineering, construction and interior space planning

In addition to our in-house construction management experts, independent professional planners, architects, engineers and consultants are selected to be part of the project team. Our Design/Build approach provides you with a team of qualified professionals, operating with proper checks and balances, with The Barkan Companies assuming the single source of accountability

Real Estate Development

At Barkan Properties, we develop quality and functional facilities which are well-located well-financed and designed to be operationally efficient.

Beginning with planned residential community projects, Barkan Properties has expanded its scope of activities to include the development of industrial and office building projects and health care facilities.

Our design/build/leaseback or sale program can provide a comprehensive development service including site selection and evaluation, market studies, feasibility analysis, financing, design and engineering, construction and property management.

Property Management

Barkan Management Company operates and manages the properties we develop for our own account In addition, we manage client-owned properties on a fee basis We have developed a comprehensive control system which enables us to report reliably on the financial and operating status of those properties entrusted to us.

Quality services are delivered to our tenants in a consistent, sensitive and economical manner

The Barkan Companies

Barkan Construction Company, Inc
Barkan Properties
Barkan Management Company

1330 Boylston Street Chestnut Hill Massachusetts 02167 617 734 9600

FORM (SF) 254
Architect-Engineer and Related Services Questionnaire

Stull Associates, Inc.
100 Boylston Street
Boston, MA 02116

2. Year Present Firm Established: 1966

3. Date Prepared: 1 April 1982

1a. Submittal is for ☐ Parent Company ☐ Branch Office

4. Type of Ownership:
4a. Minority Owned ☒ yes ☐ no

5. Name of Parent Company, if any:
N/A

5a. Former Firm Name(s), if any, and Year(s) Established:
N/A

6. Names of not more than Two Principals to Contact: Title / Telephone

1) Donald L. Stull, Principal, (617)426-0406
2) M. David Lee, Principal, (617)426-0406

7. Present Offices: City / State / Telephone / No. Personnel Each Office

7a. Total Personnel 32

Boston, Massachusetts, (617)426-0406, 32 Employees

8. Personnel by Discipline: (certain personnel responsible for more than one discipline)

3 Administrative	___ Electrical Engineers	___ Oceanographers	6 Support Staff
12 Architects	___ Estimators	2 Planners: Urban/Regional	
___ Chemical Engineers	___ Geologists	___ Sanitary Engineers	
___ Civil Engineers	___ Hydrologists	___ Soils Engineers	
1 Construction Inspectors	___ Interior Designers	1 Specification Writers	
9 Draftsmen	1 Landscape Architects	___ Structural Engineers	
___ Ecologists	___ Mechanical Engineers	___ Surveyors	
___ Economists	___ Mining Engineers	___ Transportation Engineers	

9. Summary of Professional Services Fees Received: (insert index number)

Last 5 Years (most recent year first)

	19 81	19 80	19 79	19 78	19 77
Direct Federal contract work, including overseas	2	2	1	1	1
All other domestic work	4	4	4	4	4
All other foreign work*					

*Firms interested in foreign work, but without such experience, check here: ☒

Ranges of Professional Services Fees

INDEX
1 Less than $100,000
2. $100,000 to $250,000
3. $250,000 to $500,000
4 $500,000 to $1 million
5 $1 million to $2 million
6 $2 million to $5 million
7 $5 million to $10 million
8 $10 million or greater

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Experience Profile Code Numbers
for use with questions 10 and 11

001 Acoustics; Noise Abatement
002 Aerial Photogrammetry
003 Agricultural Development; Grain Storage; Farm Mechanization
004 Air Pollution Control
005 Airports; Navaids; Airport Lighting; Aircraft Fueling
006 Airports; Terminals & Hangars; Freight Handling
007 Arctic Facilities
008 Auditoriums & Theatres
009 Automation; Controls; Instrumentation
010 Barracks; Dormitories
011 Bridges
012 Cemeteries *(Planning & Relocation)*
013 Chemical Processing & Storage
014 Churches; Chapels
015 Codes; Standards; Ordinances
016 Cold Storage; Refrigeration; Fast Freeze
017 Commercial Buildings *(low rise)*; Shopping Centers
018 Communications Systems; TV; Microwave
019 Computer Facilities; Computer Service
020 Conservation and Resource Management
021 Construction Management
022 Corrosion Control; Cathodic Protection; Electrolysis
023 Cost Estimating
024 Dams *(Concrete; Arch)*
025 Dams *(Earth; Rock)*; Dikes; Levees
026 Desalinization *(Process & Facilities)*
027 Dining Halls; Clubs; Restaurants
028 Ecological & Archeological Investigations
029 Educational Facilities; Classrooms
030 Electronics
031 Elevators; Escalators; People-Movers
032 Energy Conservation; New Energy Sources
033 Environmental Impact Studies, Assessments or Statements
034 Fallout Shelters; Blast-Resistant Design
035 Field Houses; Gyms; Stadiums
036 Fire Protection
037 Fisheries; Fish Ladders
038 Forestry & Forest Products
039 Garages; Vehicle Maintenance Facilities; Parking Decks
040 Gas Systems *(Propane; Natural, Etc.)*
041 Graphic Design
042 Harbors; Jetties; Piers; Ship Terminal Facilities
043 Heating; Ventilating; Air Conditioning
044 Health Systems Planning
045 Highrise; Air-Rights-Type Buildings
046 Highways; Streets; Airfield Paving; Parking Lots
047 Historical Preservation
048 Hospitals & Medical Facilities
049 Hotels; Motels
050 Housing *(Residential, Multi-Family; Apartments; Condominiums)*
051 Hydraulics & Pneumatics
052 Industrial Buildings; Manufacturing Plants
053 Industrial Processes; Quality Control
054 Industrial Waste Treatment
055 Interior Design; Space Planning
056 Irrigation; Drainage
057 Judicial and Courtroom Facilities
058 Laboratories; Medical Research Facilities
059 Landscape Architecture
060 Libraries; Museums; Galleries
061 Lighting *(Interiors; Display; Theatre, Etc.)*
062 Lighting *(Exteriors; Streets; Memorials; Athletic Fields, Etc.)*
063 Materials Handling Systems; Conveyors; Sorters
064 Metallurgy
065 Microclimatology; Tropical Engineering
066 Military Design Standards
067 Mining & Mineralogy
068 Missile Facilities *(Silos; Fuels; Transport)*
069 Modular Systems Design; Pre-Fabricated Structures or Components
070 Naval Architecture; Off-Shore Platforms
071 Nuclear Facilities; Nuclear Shielding
072 Office Buildings; Industrial Parks
073 Oceanographic Engineering
074 Ordnance; Munitions; Special Weapons
075 Petroleum Exploration; Refining
076 Petroleum and Fuel *(Storage and Distribution)*
077 Pipelines *(Cross-Country—Liquid & Gas)*
078 Planning *(Community, Regional, Areawide and State)*
079 Planning *(Site, Installation, and Project)*
080 Plumbing & Piping Design
081 Pneumatic Structures; Air-Support Buildings
082 Postal Facilities
083 Power Generation, Transmission, Distribution
084 Prisons & Correctional Facilities
085 Product, Machine & Equipment Design
086 Radar; Sonar; Radio & Radar Telescopes
087 Railroad; Rapid Transit
088 Recreation Facilities *(Parks, Marinas, Etc.)*
089 Rehabilitation *(Buildings; Structures; Facilities)*
090 Resource Recovery; Recycling
091 Radio Frequency Systems & Shieldings
092 Rivers; Canals; Waterways; Flood Control
093 Safety Engineering; Accident Studies; OSHA Studies
094 Security Systems; Intruder & Smoke Detection
095 Seismic Designs & Studies
096 Sewage Collection, Treatment and Disposal
097 Soils & Geologic Studies; Foundations
098 Solar Energy Utilization
099 Solid Wastes; Incineration; Land Fill
100 Special Environments; Clean Rooms, Etc.
101 Structural Design; Special Structures
102 Surveying; Platting; Mapping; Flood Plain Studies
103 Swimming Pools
104 Storm Water Handling & Facilities
105 Telephone Systems *(Rural; Mobile; Intercom, Etc.)*
106 Testing & Inspection Services
107 Traffic & Transportation Engineering
108 Towers *(Self-Supporting & Guyed Systems)*
109 Tunnels & Subways
110 Urban Renewal; Community Development
111 Utilities *(Gas & Steam)*
112 Value Analysis; Life-Cycle Costing
113 Warehouses & Depots
114 Water Resources; Hydrology; Ground Water
115 Water Supply, Treatment and Distribution
116 Wind Tunnels; Research/Testing Facilities Design
117 Zoning; Land Use Studies
201 _____
202 _____
203 _____
204 _____
205 _____

Standard Form 254 July 1975
Prescribed By GSA Fed Proc Reg (41 CFR) 1-16 803

10. Profile of Firm's Project Experience, Last 5 Years

Profile Code	Number of Projects	Total Gross Fees (in thousands)	Profile Code	Number of Projects	Total Gross Fees (in thousands)	Profile Code	Number of Projects	Total Gross Fees (in thousands)
1) 010	1	220	055	1	60			
2) 023	1	5	12) 072	4	204			
3) 027	1	300	13) 078	6	1,479			
4) 029	3	1,124	14) 084	1	1,000			
5) 033	1	20	15) 087	4	3,369			
6) 037	1	44	16) 089	6	764			
7) 047	1	63	17) 110	1	2			
8) 048	1	73	18) 117	1	2			
9) 050	7	1,467	19)					
10) 052	2	119	20)					

11. Project Examples, Last 5 Years

Profile Code	"P", "C", "JV", or "IE"	Project Name and Location	Owner Name and Address	Cost of Work (in thousands)	Completion Date (Actual or Estimated)
010	P	1 Signal Intelligence Training Area Ft. Devens, Ayer, MA	U.S. Army Corps of Engineers 26 Federal Plaza New York, New York	2,600	1982
023 052 072	P	2 Massport/Commonwealth Flats Boston, MA	Massport 99 High Street Boston, MA	20,000	1984
027	P	3 Newhallville Middle School New Haven, Connecticut	New Haven Public School Department 200 Orange Street New Haven, Connecticut	8,750	1977
029 078	P	4 O.I.C. Machine Shop Boston, MA	O.I.C. 184 Dudley Street Roxbury, MA	800	1982
029 078	P	5 Roxbury Community College Roxbury, MA	Division of Capital Planning & Operations McCormick Building, Room 1505 1 Ashburton Place, Boston, MA	19,500	1984
029	JV	6 Flordia A&M School of Business Administration Tallahassee, Florida	Dr. Walter L. Smith, President Florida A&M University Tallahassee, Florida	5,500	1982
037	P	7 NMF/Milford Milford, Connecticut	National Park Service 755 Parfet Avenue Denver, Colorado	600	1981

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		Springfield Armory Springfield, MA	733 Tarret Avenue Denver, Colorado	600	1981
048	P	Judge Baker Guidance Center Boston, MA	Judge Baker Guidance Center 295 Longwood Avenue Boston, MA	865	1981
050 089	P	St. Botolph Housing Boston, MA	St. Botolph Associates Prudential Center Boston, MA	2,000	1981
050	P	120 Centre Court Brookline, MA	C.F. Associates 100 Centre Plaza Brookline, MA	3,350	1977
050	P	Marcus Garvey Housing Boston, MA	Marcus Garvey Associates 806 Massachusetts Avenue Cambridge, MA	6,600	1979
050	P	Revere House Revere, MA	Hebrew Rehabilitation Center For Aged 1200 Centre Street Roslindale, MA	2,500	1978
050	P	Chad/Brown Housing Providence, Rhode Island	Providence Housing Authority 673 Academy Road Providence, Rhode Island	1,900	1983
052 072	P	Digital Manufacturing Facility Boston, MA	Digital Equipment Corporation 146 Main Street Maynard, MA	2,500	1978
055 072	P	IBM/Gateway Newton, MA	IBM Real Estate and Construction Division 60 Mamaroneck Avenue Harrison, New York	280	1979
055 072	P	IBM Offices Boston, MA	IBM 60 State Street Boston, MA	withheld at Owner's Request	1977
078	P	FHWA CBD Study DOT-FH-11-9652 Washington, D.C.	U.S. Dept. of Transportation, FHWA Office of Program & Policy Planning 400 7th Street, S.W. Washington, D.C.	227	1980
078	P	FHWA Joint Development Study DOT-FH-11-9708 Washington, D.C.	U.S. Dept. of Transportation, FHWA Office of Environmental Policy 400 7th Street, S.W. Washington, D.C.	N/A	1980

078	P	Pedestrian Planning Procedures Course Washington, D.C.	National Highway Institute 400 7th Street, S.W. Washington, D.C.	N/A	1981
078	P	21 Century Freeway Study Los Angeles, California	Dept. of Economic & Business Development 1120 N. Street - P.O. Box 1499 Sacramento, California	N/A	1982
078	P	22 Bird Island Flats Design Review Boston, MA	Massport 99 High Street Boston, MA	50	1982
084	JV	23 Suffolk County Correction Facility Boston, MA	Boston Public Facilities City Hall Boston, MA	25,000	1985
087	P	24 Rapid Transit Station Modernization New York, New York	New York City Transit Authority 370 Jay Street Brooklyn, New York	12,000	1986
087	P	25 Ruggles Street Transit Station Boston, MA	Mass Bay Transportation Authority 50 High Street Boston, MA	14,500	1984
087	P	26 Southwest Corridor Project Boston, MA	Mass Bay Transportation Authority 50 High Street Boston, MA	500,000	1984
087	JV	27 Amtrak Service Facility Boston, MA	Deleuw, Cather & Parsons 2101 Connecticut Avenue, N.W. Washington, D.C.	16,000	1983
089	P	28 Poppleton NSA 1 Baltimore, Maryland	Housing Innovations 50 Franklin Street Boston, MA	5,500	1981
089 050	P	29 Franklin Park Housing Boston, MA	Housing Innovations 50 Franklin Street Boston, MA	4,000	1982
110 117 078	P	30 Bath Downtown Development Study Bath, Maine	Bath Downtown Development Corp. 112 Front Street Bath, Maine	N/A	1981

12. The foregoing is a statement of facts

Signature: _____ **Typed Name and Title:** Donald L. Stull, FAIA, Principal

Date: 1 April 1982

☆ U.S.GPO:1979-0-281-187/4385

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FORM (SF) 255
Architect-Engineer Related Services for Specific Project

Columbia Point Redevelopment
Boston, MA

2a. Commerce Business Daily Announcement Date, if any: N/A

2b. Agency Identification Number, if any: N/A

3. Firm (or Joint-Venture) Name & Address

Stull Associates, Inc.
100 Boylston Street
Boston, MA 02116

3a. Name, Title & Telephone Number of Principal to Contact

Donald L. Stull, (617) 426-0406
M. David Lee, (617) 426-0406

3b. Address of office to perform work, if different from Item 3

Same

4. Personnel by Discipline:

3 Administrative	___ Electrical Engineers	___ Oceanographers	6 Support Staff
11 Architects	___ Estimators	2 Planners. Urban/Regional	
___ Chemical Engineers	___ Geologists	___ Sanitary Engineers	
___ Civil Engineers	___ Hydrologists	___ Soils Engineers	
1 Construction Inspectors	___ Interior Designers	1 Specification Writers	
5 Draftsmen	1 Landscape Architects	___ Structural Engineers	
___ Ecologists	___ Mechanical Engineers	___ Surveyors	
___ Economists	___ Mining Engineers	___ Transportation Engineers	30 Total Personnel

5. If submittal is by Joint-Venture list participating firms and outline specific areas of responsibility (including administrative, technical and financial) for each firm: (Attach SF 254 for each if not on file with Procuring Office.)

N/A

5a. Has this Joint-Venture previously worked together? ☐ yes ☐ no

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[illegible] Consultants/Associates Listed, if not already of file with the Procuring Office)

Name & Address	Specialty	Worked with Prime before (Yes or No)
1) Sippican Consultants International, Inc. 1033 Massachusetts Avenue Cambridge, MA 02138	Mechanical, Electrical, Structural Engineering	YES
2) Moriece & Gary, Inc. 25 Mt. Auburn Street Cambridge, MA 02138	Landscape Architecture	YES
3)		
4)		
5)		
6)		
7)		
8)		

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a. Name & Title: Donald L. Stull, FAIA Principal	**a. Name & Title:** M. David Lee, AIA Principal
b. Project Assignment: Project Principal Architecture	**b. Project Assignment:** Project Principal Urban Design & Community Planning
c. Name of Firm with which associated: Stull Associates, Inc.	**c. Name of Firm with which associated:** Stull Associates, Inc.
d. Years experience: With This Firm 16 **With Other Firms** 5	**d. Years experience: With This Firm** 11 **With Other Firms** 3
e. Education: **Degree(s) / Year / Specialization** B. Arch., 1961, Architecture M. Arch., 1967, Architecture	**e. Education:** **Degree(s) / Years / Specialization** B. Arch., 1967, Architecture M. Arch., 1971, Urban Design
f. Active Registration: **Year First Registered/Discipline** Massachusetts, 1964, Architecture (NCARB)	**f. Active Registration:** **Year First Registered/Discipline** Massachusetts, 1971, Architecture
g. Other Experience and Qualifications relevant to the proposed project: Founder and Principal of Stull Associates, Mr. Stull continues to function in both an administrative and design capacity with design review authority on all Stull Associates projects. Relevant projects on which he has been engaged include: Ruggles Street Station, Southwest Corridor Project, Boston, MA; Southwest Corridor Project, Boston, MA; Rutland Road Houses, Brooklyn, NY; Highland Park Redevelopment, Roxbury, MA; Central Business District Redevelopment, New Brunswick, NJ and Salem, MA; Tremont Hammond Neighborhood Plan, Boston, MA; Roxbury Community College, Roxbury, MA; Harriet Tubman House, Boston, MA; Poppleton NSA 1 Housing, Baltimore, MD; Times Square Mixed Use Project, New York, NY. Mr. Stull has also served as Chairman of the Massachusetts State Building Code Commission and on the faculties of Harvard and Yale University.	**g. Other Experience and Qualifications relevant to the proposed project:** As a Principal with Stull Associates, Mr. Lee is involved in a broad range of planning, urban design and architecture projects. He served as Project Principal for the Bird Island Flats Project with MASSPORT. He also served as Principal-In-Charge of the Southwest Corridor System-wide Urban Design Concepts and Architectural Coordination. Mr. Lee has directed several planning studies for the Federal Highway Administration and is beginning work on an urban design concept plan for the Century Freeway Corridor in Los Angeles, California. Other project activities include: The development of a comprehensive planning strategy for the Roxbury Action Program, Boston, Massachusetts; Principal Designer, John Eliot Square Master Plan and First Phase Urban Design Improvements, Boston, Massachusetts; Principal Designer for America Park, a 750-unit housing and related community facilities study, Lynn, Massachusetts; Project Architect for TDC III, a 212-unit scattered site residential renovation project, Boston, Massachusetts.

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Prescribed By GSA Fed. Proc. Reg (41 CFR) 1-16 803

7. Brief Resume of Key Persons, Specialists, and Individual Consultants Anticipated for this Project

a. Name & Title: Charles Norris Associate	**a. Name & Title:** Barry Milofsky Associate
b. Project Assignment: Project Associate Planning & Urban Design	**b. Project Assignment:** Project Associate Architect
c. Name of Firm with which associated: Stull Associates, Inc.	**c. Name of Firm with which associated:** Stull Associates, Inc.
d. Years experience: With This Firm 3 **With Other Firms** 8	**d. Years experience: With This Firm** 7 **With Other Firms** 5
e. Education: **Degree(s) / Year / Specialization** A.B., 1965, Architecture B. Arch./M. Arch., 1968, Architecture M. Arch., 1969, Urban Design	**e. Education:** **Degree(s) / Years / Specialization** B.S., 1971, Architecture
f. Active Registration: **Year First Registered/Discipline** Massachusetts, 1974, Architecture	**f. Active Registration:** **Year First Registered/Discipline** Massachusetss, 1975, Architecture
g. Other Experience and Qualifications relevant to the proposed project: Mr. Norris has been involved in a variety of urban design and architectural projects. He recently served as Project Architect/Urban Designer on the Bird Island Flats Project in Boston, MA. He is also Associate-In-Charge of the design of Roxbury Community College in Boston, MA. He previously served as Principal Investigator for a Federal Highway Administration Project, "Highway Joint Development"and Mr. Norris has additionally served as Project Director for the Boston Public Library Restoration/Renovation Program and the Bath (Maine) Downtown Redevelopment Plan. Prior to joining Stull Associates, Mr. Norris participated in a wide range of projects including designer of the Hoyt-Scher merhorn subway mezzanine and town square in Brooklyn for Benjamin Thompson Associates; community planning in Upper Albany, Hartford, for Skidmore, Owings and Merrill; urban design on the Brighton Marina project for B SD, U.K. Ltd, in London.	**g. Other Experience and Qualifications relevant to the proposed project:** Mr. Milofsky has served as Project Architect/Urban Designer on the Southwest Corridor Transit Project and as Assoicate-in-Charge of the New York City Transit Authority Station Modernization Project. Prior to his transit work, much of Mr. Milofsky's work focused on housing.Related projects include: Columbia Point Housing, Boston, MA; Roxbury Action Project IIA, Roxbury, MA and a Massachusetts Department of Community Affairs housing condition inventory. Additional experience includes: Urban Designer, Bath (Maine) Downtown Redevelopment Plan; Project Architect, lecture hall and entrance, Museum of Fine Arts, Boston, MA; Design Revision and Construction Supervision, One Federal Street Office Building, Boston, MA and Designer, American Institute of Architects headquarters in Washington, D.C. Mr. Milofsky also worked in Israel for a year at the Ministry of Housing and Municipal Council of Karmiel.

7. Brief Resume of Key Persons, Specialists, and Individual Consultants Anticipated for this Project

a. Name & Title: Hezekiah Pratt
Architect/Planner

b. Project Assignment: Project Urban Designer

c. Name of Firm with which associated: Stull Associates, Inc.

d. Years experience: With This Firm 5 **With Other Firms** 3

e. Education: **Degree(s) / Year / Specialization**

B. Arch., 1972, Architecture
M. Arch., 1974, Architecture
M. City Planning, 1974

f. Active Registration: **Year First Registered/Discipline**

Massachusetts, 1981, Architecture

g. Other Experience and Qualifications relevant to the proposed project:

Since joing Stull Associates, Inc. in 1977, Mr. Pratt has been involved in numerous large scale projects. He recently served as Job Captain on the Chad/Ad Housing Modernization Project in Providence, Rhode Island.

Other related projects include: Poppleton NSA2, Baltimore, Maryland; Franklin Field Housing Renovation, Boston, MA.; and Roxbury Action Program (RAP III) Multi-Family Housing, Roxbury, MA.

a. Name & Title: Jack Patrick, Jr.
Architect

b. Project Assignment: Project Architect

c. Name of Firm with which associated: Stull Associates, Inc.

d. Years experience: With This Firm 5 **With Other Firms** 13

e. Education: **Degree(s) / Years / Specialization**

B. Arch., 1967, Architecture
M. Arch., 1983, Landscape Architecture

f. Active Registration: **Year First Registered/Discipline**

Maryland, 1971, Architecture
District of Columbia, 1975, Architecture

g. Other Experience and Qualifications relevant to the proposed project: Mr. Patrick has served as Designer on the MBTA Red Line Subway Tunnel Ventilation Project and as Project Architect on Roxbury Community College and the East Greenwich Wastewater Treatment Plant in Connecticut. Mr. Patrick formerly worked in Washington, D.C., where in private practice he was responsible for more than $2.5 million of publicly assisted rehabilitated housing construction. In his thirteen years of experience in architecture, land development planning and environmental design, he has worked with public agencies in determining development guidelines for housing, commercial and educational facilities and community participation processes. He additionally worked with the Rouse Company in the design, planning and staging of downtown Columbia, Maryland. As a consultant, he collaborated with several leading firms on the design of a major mixed use development around a rapid transit station in suburban Maryland.

7. Brief Resume of Key Persons, Specialists, and Individual Consultants Anticipated for this Project

a. Name & Title: Barbara Barros Urban Designer/Planner	a. Name & Title:
b. Project Assignment: Project Planner	b. Project Assignment:
c. Name of Firm with which associated: Stull Associates, Inc.	c. Name of Firm with which associated:
d. Years experience: With This Firm 5 With Other Firms 7	d. Years experience: With This Firm ___ With Other Firms ___
e. Education: Degree(s) / Year / Specialization B.S., 1972, Urban Design, City Planning M. Land. Arch., 1981, Urban Design	e. Education: Degree(s) / Years / Specialization
f. Active Registration: Year First Registered/Discipline None	f. Active Registration: Year First Registered/Discipline
g. Other Experience and Qualifications relevant to the proposed project: As an Urban Designer with Stull Associates, Ms. Barros has served as project coordinator for the Bird Island Flats project for MASSPORT. Her responsibilities have included co-direction of the BIF-DARC community review panel, review of mixed-use development proposals for the completion, and coordination of the Harborwalk design. Ms. Barros has also assisted in the New York Transit Authority station modernization project and the Fort Worth I-30 impact study. Prior to joining Stull Associates, Ms. Barros worked as an Urban Designer/Planner with the City Planning Board in Pittsfield, Massachusetts, where the was involved in the Revitalization plan for the City's downtown area and also served as Project Supervisor for a Historical Resources Survey. She additionally served as a Planner with the Franklin County Regional Planning Commission and Gordon Ainsworth Associates, Civil Engineers, both located in Massachusetts.	g. Other Experience and Qualifications relevant to the proposed project:

a. Project Name & Location	b. Nature of Firm's Responsibility	c. Owner's Name & Address	d. Completion Date (actual or estimated)	e. Estimated Cost (in thousands)	
				Entire Project	Work for which Firm was/is responsible
(1) Council of Elders Housing Boston, Massachusetts	Architect of Record	Council of Elders, Inc. 55 Dimock Street Roxbury, MA	1983	8,000	8,000
(2) Chad/Ad Housing (R) Providence, Rhode Island	Architect of Record	Providence Housing Authority 673 Academy Avenue Providence, Rhode Island	1983	2,600	2,600
(3) Marcus Garvey Housing Boston, Massachusetts	Architect of Record	Marcus Garvey Associates 806 Massachusetts Avenue Cambridge, MA	1979	4,000	4,000
(4) Revere House Revere, Massachusetts	Architect of Record	HRCA 12 ^ Centre St. Roslindale, MA	1978	6,850	6,850
(5) Rutland Road Houses East Flatbush, New York	Architect of Record	N.Y. State Urban Dev. Corp. 1515 Broadway New York, New York	1976	16,000	16,000
(6) TDC Housing I & II (R) Boston, Massachusetts	Architect of Record	Greater Boston Dev. Corp. 79 Milk Street Boston, Massachusetts	1974	5,200	5,200
(7) 1550 Beacon Brookline, Massachusetts	Architect of Record	B-L Associates 1550 Beacon St. Brookline, MA	1972	3,700	3,700
(8) Amherst Housing Amherst, Massachusetts	Architect of Record	Dev. Corp. of America Sears Crescent - City Hall Sq. Boston, MA	1972	3,700	3,700
(9) Charrette Store Cambridge, MA	Architect of Record	Charrette Corporation 31 Olympia Avenue Woburn, MA	1976	WITHHELD AT OWNER'S REQUEST	
(10) Jackie Robinson Middle School New Haven, CT	Architect of Record	Public School Department 200 Orange Street New Haven, CT	1977	8,750	8,750

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9. All work by firms or Joint Venture members currently being performed directly for Federal agencies

a. Project Name & Location	b. Nature of Firm's Responsibility	c. Agency (Responsible Office) Name & Address	d. Percent complete	e. Estimated Cost (In Thousands)	
				Entire Project	Work for which firm is responsible
Veteran's Administration Incinerator	Architect of Record	Veteran's Administration Medical Center 150 South Huntington Ave. Boston, MA	90%	225	225

Stull Associates, Inc., is recognized as one of the foremost architecture and urban design firms in the United States. In 1968, two years after its formation, the firm first achieved prominence for its innovative planning and design of large scale housing programs. Much of this recognition resulted from early involvement in the development of building systems and prefabricated component design. During the same period, SAI pioneered concepts in community planning and urban design.

In recent years Stull Associates has grown from a small group of designers concentrated in multiple family housing and related work to its present staff of nearly 40 architects, planners, landscape architects, and urban designers. Stull Associates has successfully completed nearly 100 major projects, representing a total construction value in excess of $500,000,000.

In addition to eight regional and national design awards presented by the American Institute of Architects, the office has been cited for its work on the Southwest Corridor Project by Urban Design Newsletter in its Fourth Annual Awards Program. Several projects have also appeared in professional publications, including Progressive Architecture, Architectural Forum, Architectural Record, Urban Design Magazine, AU (Japan), Baumeister (Germany) and L'Industria Delle Construzioni (Italy).

The design and technical capabilities of Stull Associates are surpassed only by the firm's ability to complete a project on schedule, even when working within restricted time contraints. The personnel assigned to this project bear significant experience in their job areas and are capable of meeting the required standards of excellence.

11. The foregoing is a statement of facts.

Signature: M. David Lee

Typed Name and Title: M. David Lee, AIA, Principal

Date: 28 October 1982

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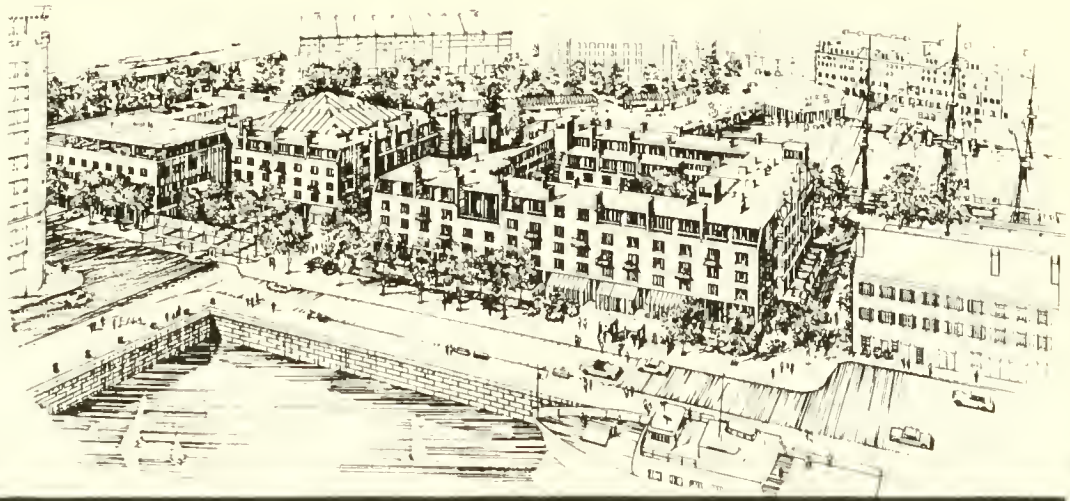
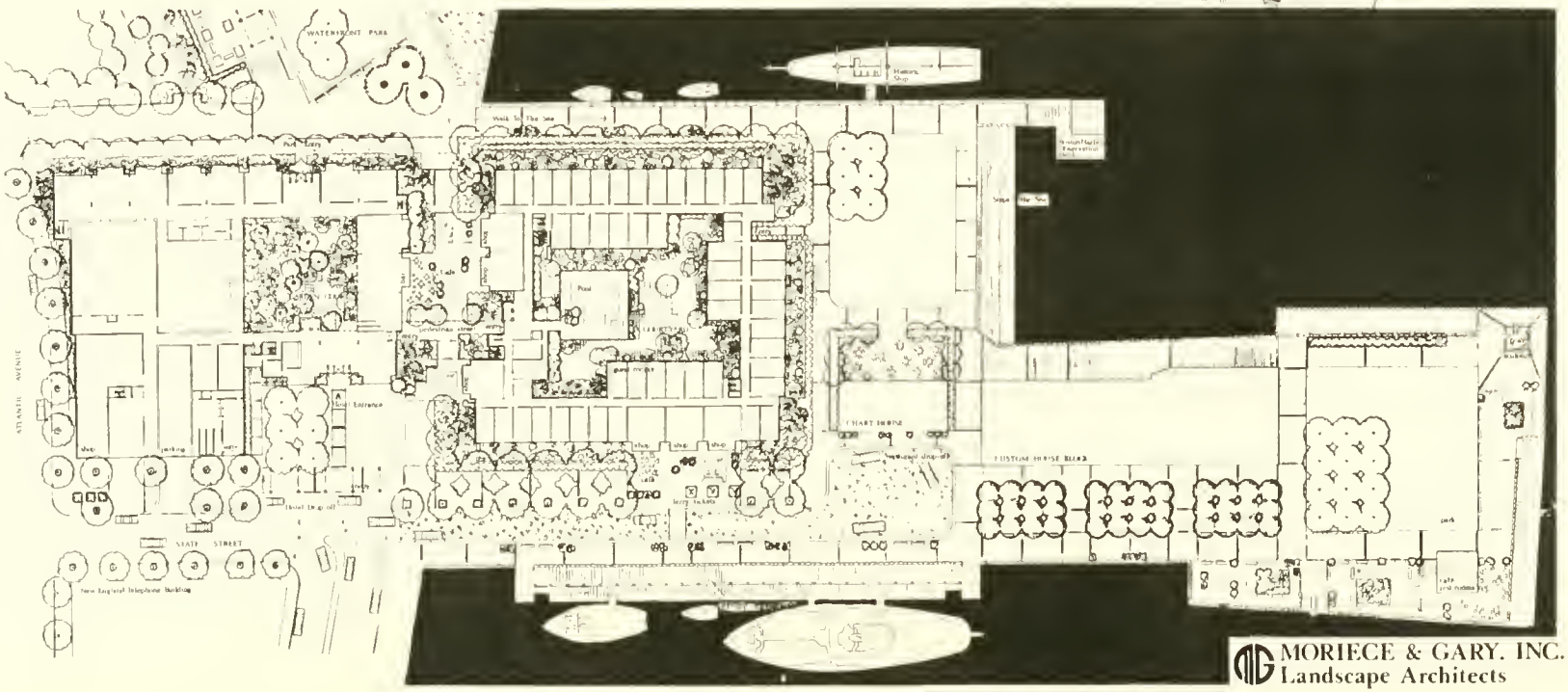
Boston Harbor Hotel

Boston, Massachusetts

This hotel complex of four hundred rooms , structural parking, shops and subway station is planned for historic Long Wharf overlooking Boston Harbor. The landscapes of the atrium-restaurant, central courtyard and peripheral site complement the building. This hotel designed by Graham Gund Associates, Architect, with the Dunfey Family Corporation was submitted to the B.R.A. in competition with other developers in 1978.

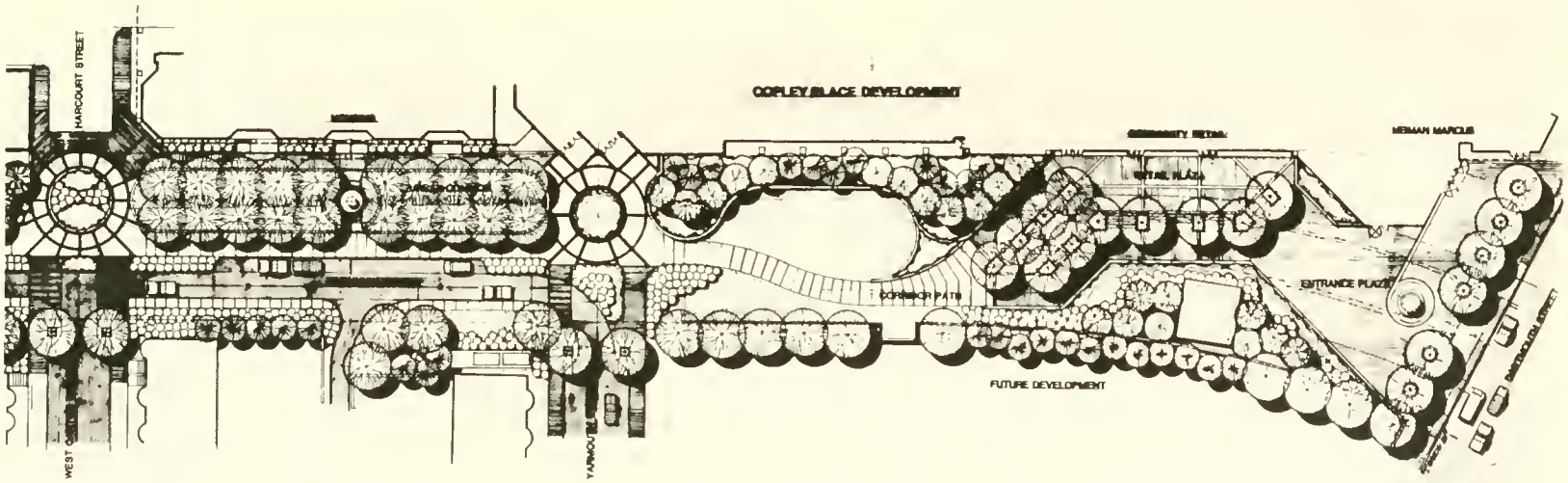


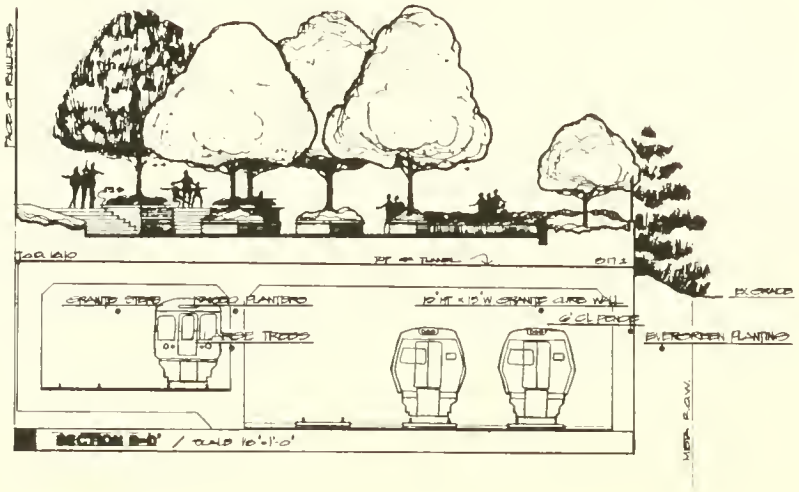


MORIECE & GARY, INC.
Landscape Architects

Copley Place Corridor Deck

Boston, Massachusetts





The Copley Place Development in Boston's Back Bay forms the backdrop for an exciting Urban Park which compliments this $318 million multi-use development complex. Moriece & Gary, landscape architectural consultants to the Urban Investment and Development Co., have woven into the park design, solutions to the special needs of the surrounding urban community, the new community retail, housing, interior shopping mall and the Neiman-Marcus Department Store. Built upon the deck over the M.B.T.A. tunnel, the project presented many unique technical challenges. To be completed in 1983, the Copley Place Deck will effectively integrate the surrounding urban Developments.

MORIECE & GARY, INC.
Landscape Architects

Glover Landing

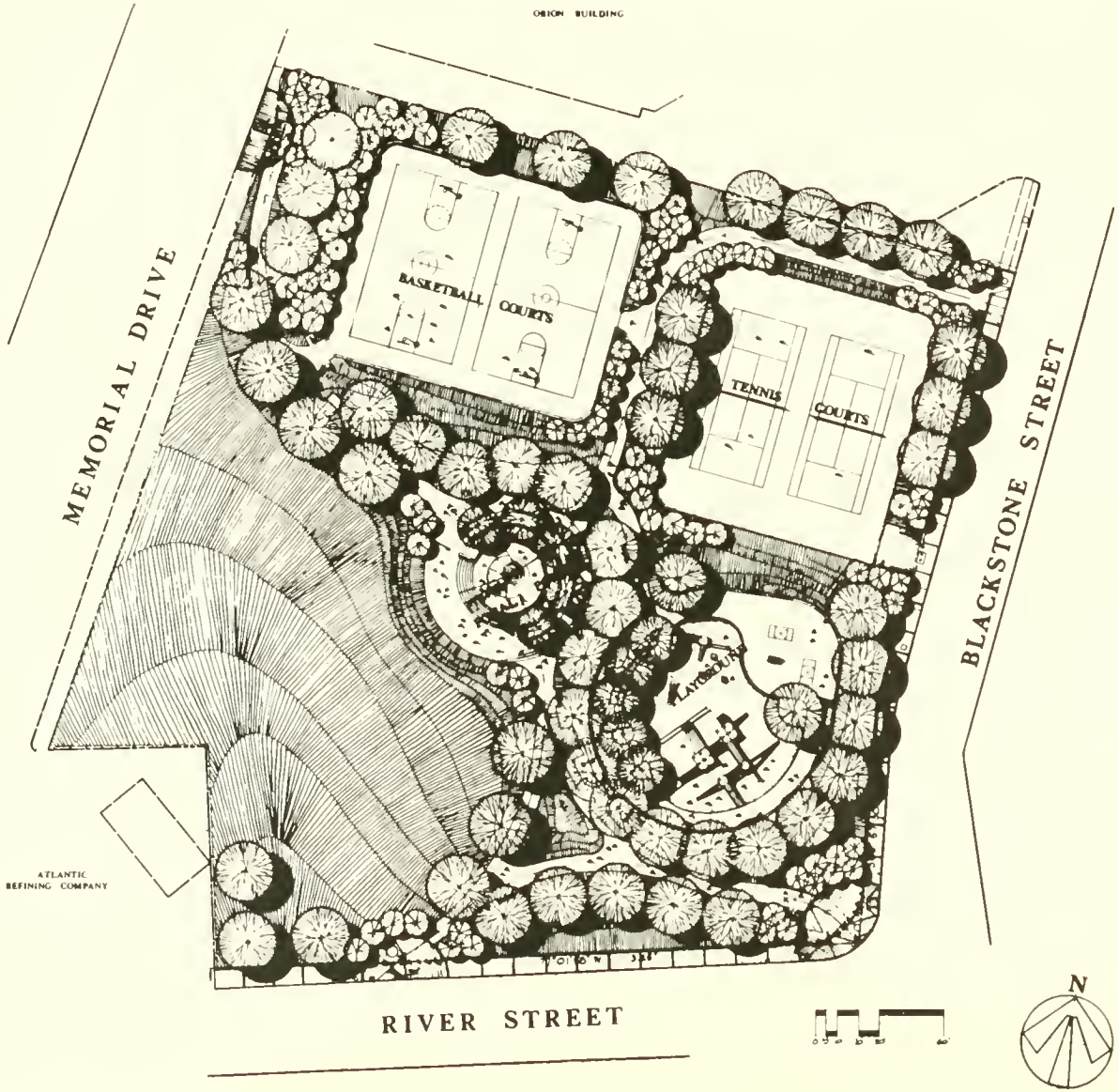
Marblehead, Massachusetts

This cluster of one hundred fourteen units is well integrated into the four and one half acre site with its spectacular panoramic view of Marblehead Harbor. Completed in 1966 with Chapman and Goyette, Architects, the development's high density blends well with the surrounding seaport and creates small private spaces with views to the harbor as the units step down to the ocean. Although the rocky terrain required considerable use of retaining walls, these were keep low and in scale with the small areas between buildings.

MORIECE & GARY, INC.
Landscape Architects

Riverside Press Park

Cambridge, Massachusetts

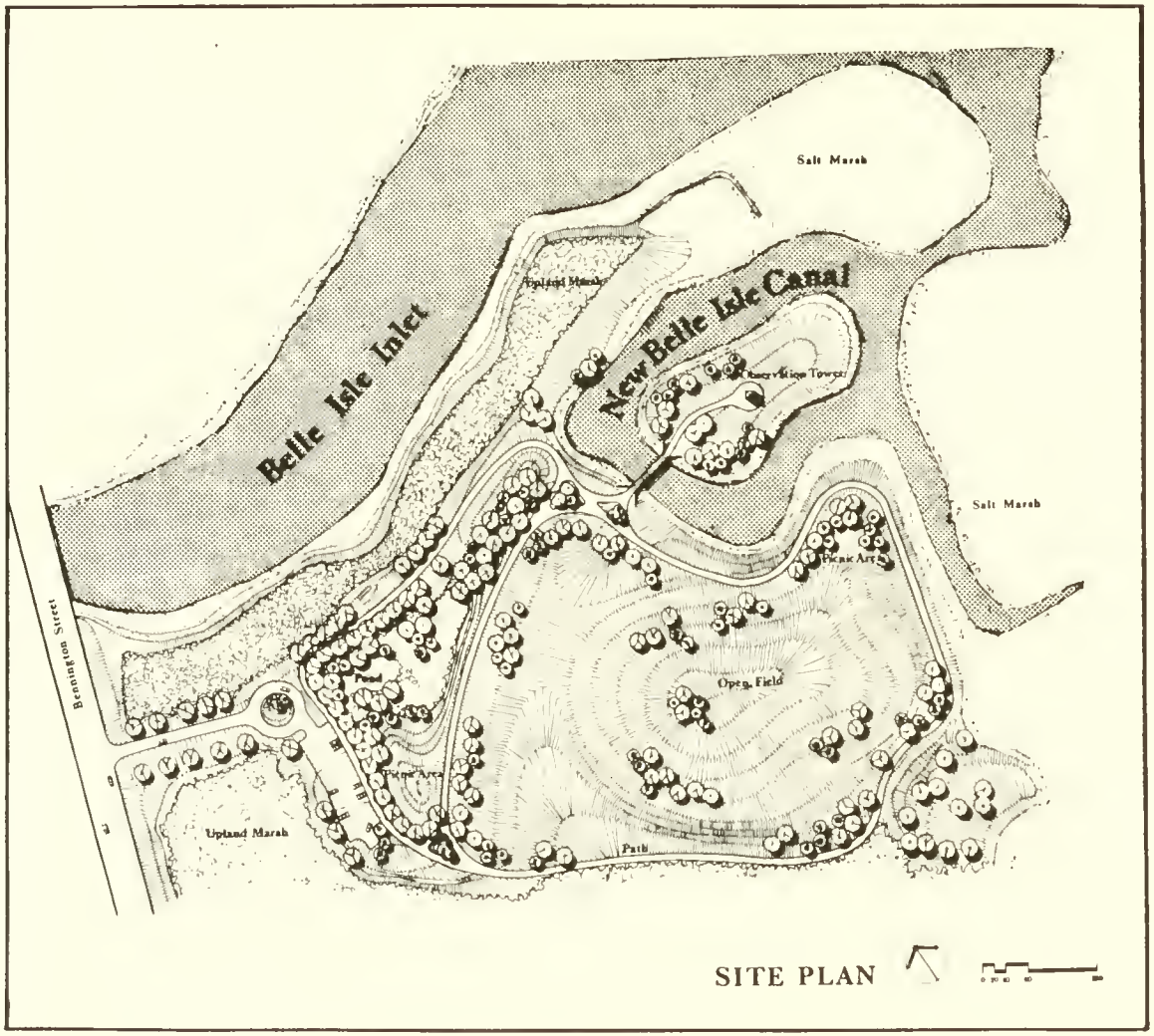


Development of Riverside Press Park has given Cambridge residents a "window on the Charles". Adjacent to the river in a densely populated urban neighborhood, the park was designed not only to meet neighborhood recreational needs, but also to serve as an attractive entrance to the City of Cambridge. Recreational facilities include basketball and tennis courts and a childrens play area with equipment suitable for the handicapped. For easy access and safety, the active play area is located on the side of the park adjacent to the neighborhood. Walkways in the park lead to a central, raised sitting/stage area overlooking a large lawn for informal play which slopes toward the river.

MORIECE & GARY, INC.
Landscape Architects

Belle Isle Marsh Reservation

Boston, Massachusetts



Belle Isle Marsh Reservation is a resource-based recreation area in the tidal marshes of Belle Isle Inlet. Designed for passive recreation and to increase the public's awareness of tidal action, the park will provide much-needed open space and recreational facilities in the densely populated surrounding urban neighborhood. Moriece and Gary lead a team of environmental consultants in planning and designing the reclamation and restoration of the former drive-in theater site. Salt marsh grasses were replanted and a canal constructed to again bring the flow of tides onto the site. Unique methods of treating the material dredged from the canal allowed the spoils to be used for constructing earthforms. Recreational facilities provided in the park include paths for jogging and bicycling, areas for picnicking and fishing, and an island tower for observing tidal action and wildlife in the marshes.

MORIECE & GARY, INC.
Landscape Architects

HOUSING EXPERIENCE

Stull Associates has successfully completed projects exceeding 500 million dollars in construction value. Included are numerous renovation projects involving major structural modifications and change of building image. More specifically, the firm has completed the renovation of more than 2,000 housing units in addition to thousands of new units including 531 units in six separate developments currently in construction.

Among the largest housing developments completed by Stull Associates to date are the Rutland Road complex in Brooklyn, NY and the Central Brooklyn Infill Housing Project (Phase I) Brooklyn, NY. In addition to the 440 apartments units in the Rutland Road Project, the client (New York UDC) specified ancillary functions including medical, commercial and public facilities. The Central Brooklyn Infill Housing Project involved 5,500 dwelling units (Phase I & II) of prefabricated systems housing located on scattered sites.

Among the multi-family projects which Stull Associates has had the full design and programming responsibility for are the Poppleton NSA housing project in Baltimore, 141 units of new and renovated units which carefully considered the compatibility of new construction with existing structures; and the Village Park multi-family housing project in Amherst, MA which included 200 wood frame duplex townhouses, plus laundry and management facilities.

Stull Associates has also completed several housing projects for the elderly including, Revere House in Revere, MA, a 266 unit elderly housing complex located on the Atlantic Ocean with health, dining and commercial facilities; the Council of Elders Housing, Boston, MA., a 149 unit high-rise with community, kitchen, laundry and outdoor recreational areas.

STATEMENT ON PREVIOUS OR PENDING LITIGATION

Currently, Stull Associates is not involved in any litigation, nor is any such action pending. Previous litigation involved the Cochituate Homes Project in Framingham, Massachusetts and was resolved in December, 1980.

COMMUNITY PLANNING EXPERIENCE

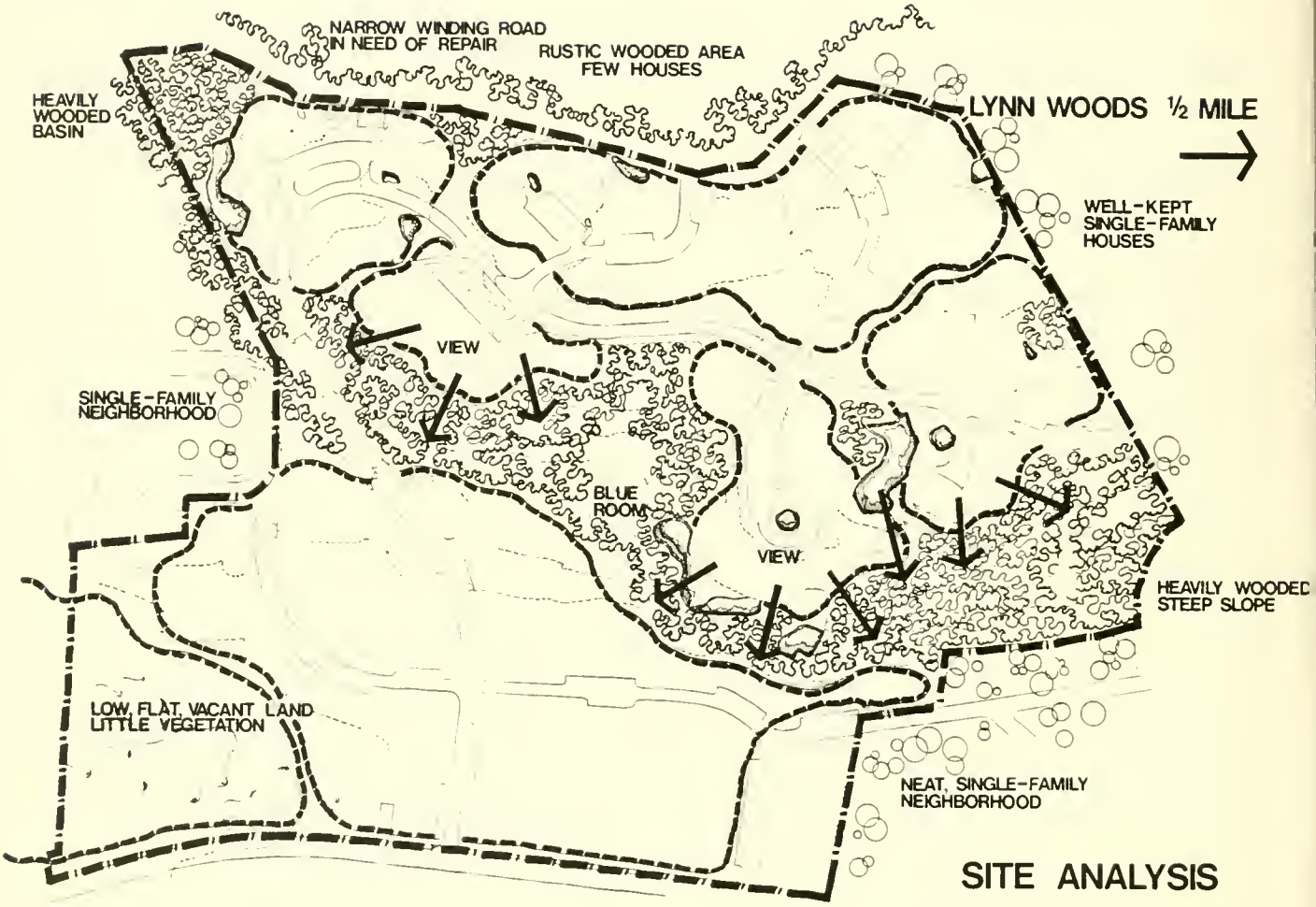
Stull Associates and Housing Innovations have long and varied experiences in working with tenants and community groups. For nearly 10 years, SAI has played a key role in the development of the Southwest Corridor Transportation Project. SAI's involvement originated at the request of a coalition of community organizations based in the South End, Roxbury and Jamaica Plain. During the Environmental Impact analysis phase of the project, SAI and HII shared responsibility for community liaison activities.

For many years, Stull Associates served as principal planning consultants and architects for the Roxbury Action Program, best known as RAP. In that capacity, SAI was intimately involved in generating strategies for funding and economic development. Recently SAI completed master planning and the design of a pilot area which represents the first phase of the renovation of the Chad Brown, Admiral Terrace public housing project in Providence, Rhode Island. This complex planning process included substantial tenant involvement during the master planning.

Both SAI principals, Don Stull and David Lee have directed and consulted on numerous planning charrettes throughout the country with local citizens groups concerned with issues of housing, transportation and community development very similar to those at Columbia Point.

This plan for an economically balanced community on 58 wooded and rocky acres of land was the product of a joint effort between The Development Team and a public housing tenants group occupying obsolete and deteriorating housing on a portion of the site. Development staging to minimize disruption of existing residents, wide variations in subsoil conditions, severe topography, the need to maximize options in unit types and the programming of needed support facilities were inherent factors influencing design. The final solution consists of a series of distinct residential sub-areas linked through the disposition and articulation of public open spaces and facilities.

AMERICA PARK



SITE ANALYSIS

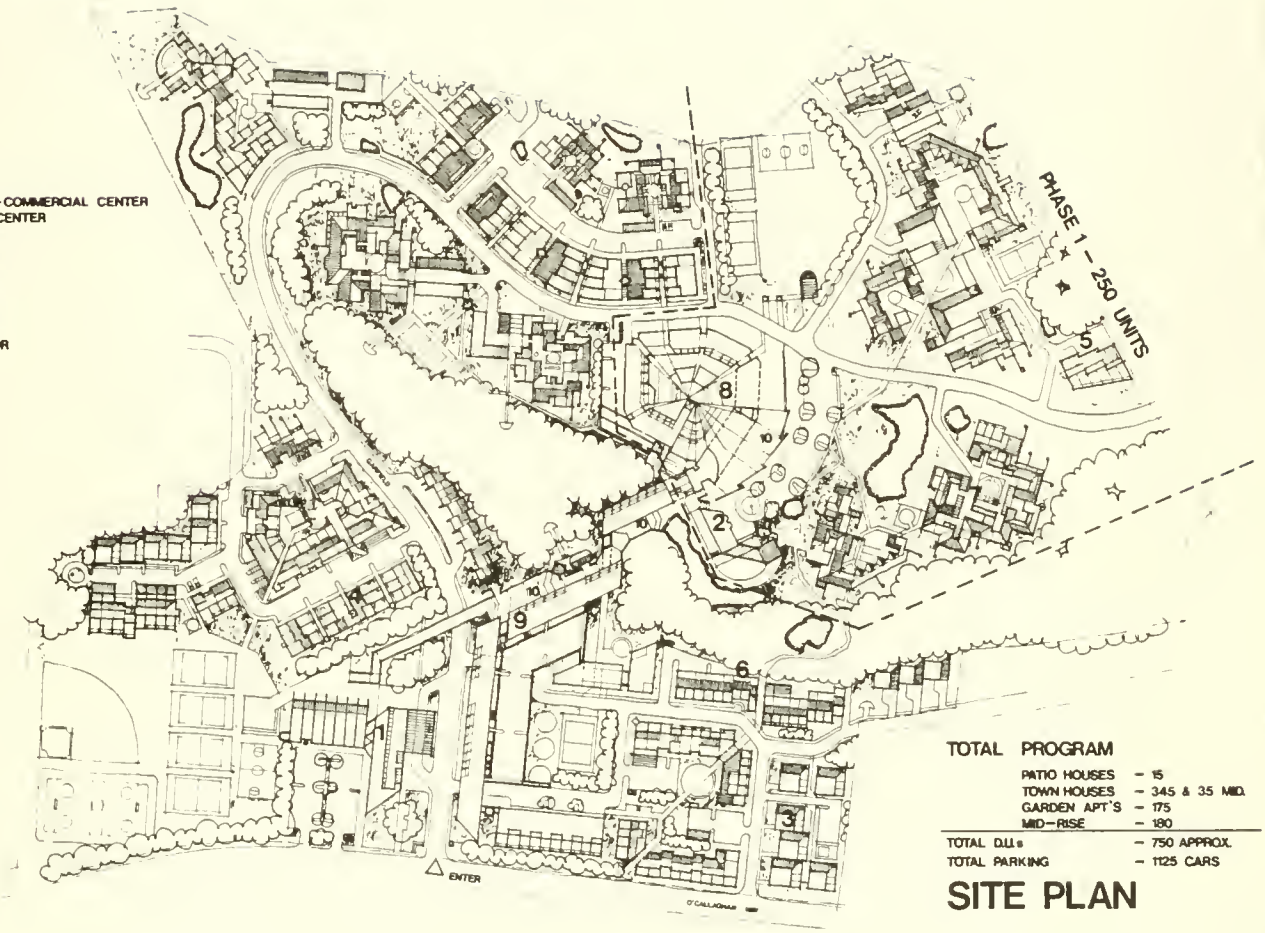
PROPOSED REDEVELOPMENT OF
AMERICA PARK
LYNN, MASSACHUSETTS

DEVELOPER STERN ASSOCIATES, INC.
100 CENTRE STREET BROOKLINE, MASS.
ARCHITECT STULL ASSOCIATES INC
431 MARLBORO STREET BOSTON, MASS

3
SHT NO.

GEND

- LOWER RECREATIONAL-COMMERCIAL CENTER
- UPPER RECREATIONAL CENTER
- TYPICAL PATIO HOUSES
- TOWNHOUSE TYPE A
- TOWNHOUSE TYPE B
- TOWNHOUSE TYPE C
- TOWNHOUSE TYPE D
- GARDEN APARTMENTS
- MID-RISE APARTMENTS
- PEDESTRIAN CONNECTOR



TOTAL PROGRAM

PATIO HOUSES	– 15
TOWN HOUSES	– 345 & 35 MID.
GARDEN APT'S	– 175
MID-RISE	– 180
TOTAL D.U.'s	– 750 APPROX.
TOTAL PARKING	– 1125 CARS

SITE PLAN

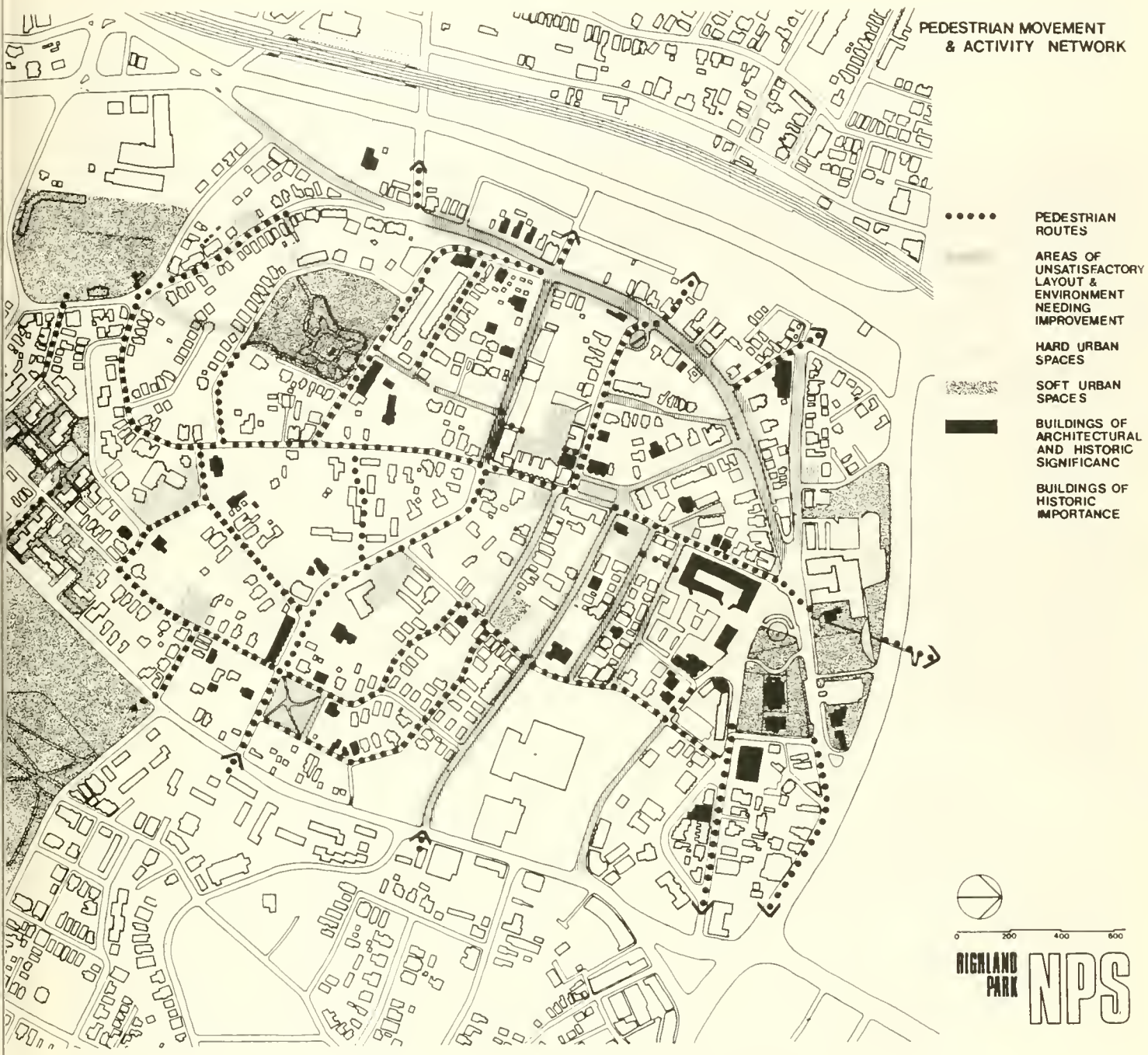
PROPOSED REDEVELOPMENT OF
AMERICA PARK
LYNN, MASSACHUSETTS

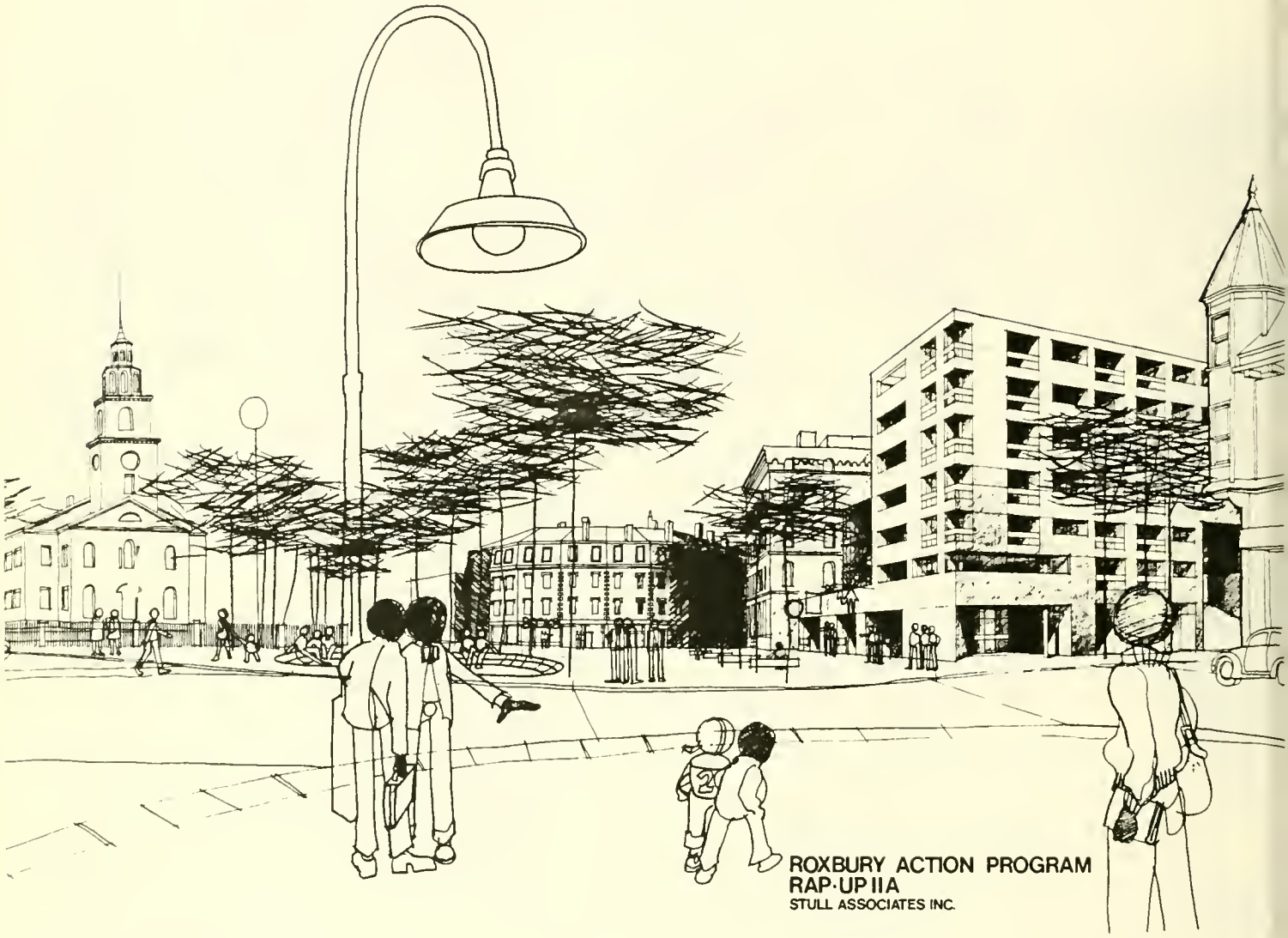
DEVELOPER STERN ASSOCIATES, INC.
100 CENTRE STREET BROOKLINE, MASS.
ARCHITECT STULL ASSOCIATES, INC.
431 MARLBORO STREET BOSTON, MASS

8
SHT. NO.

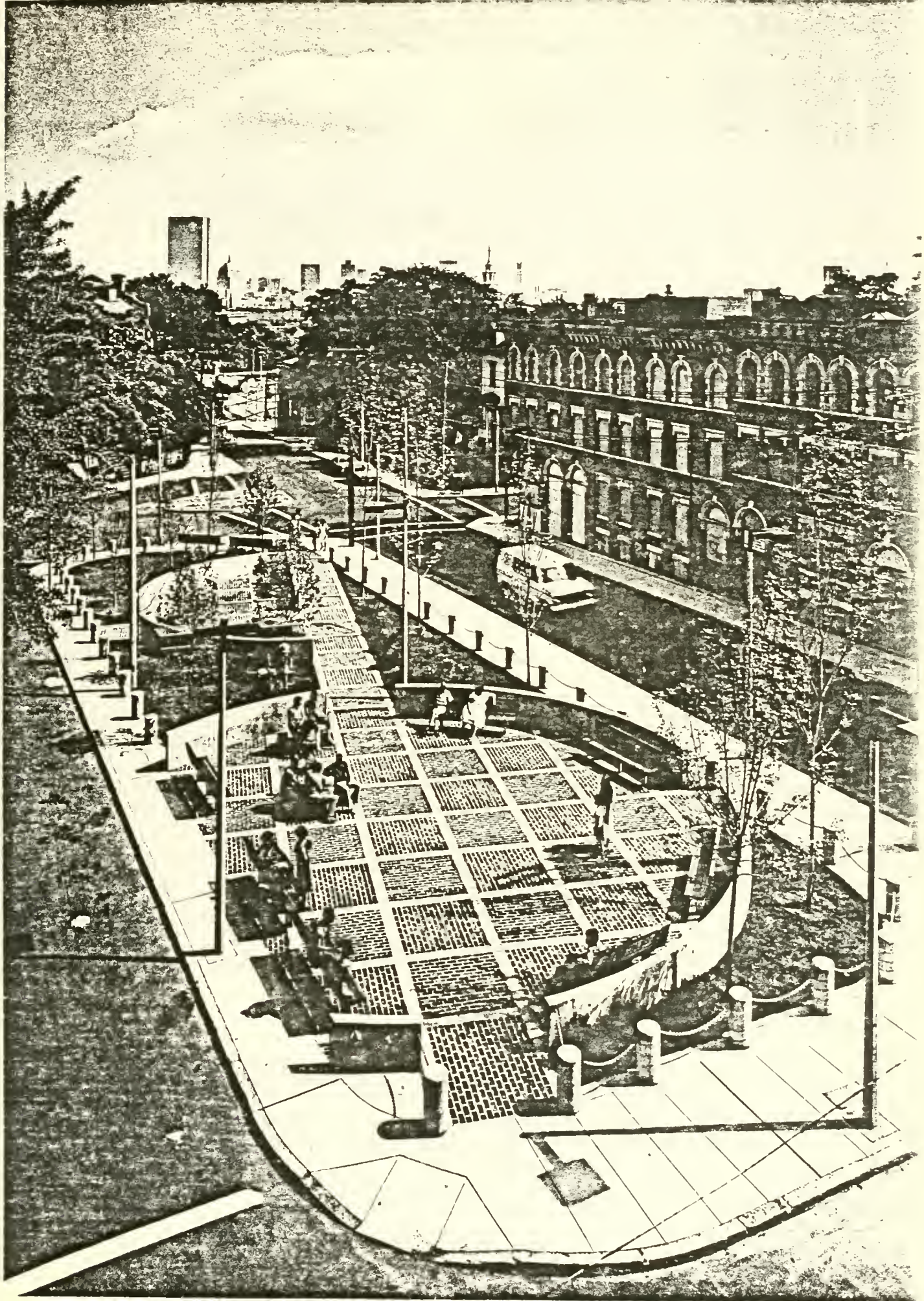
Highland Park is a striking inner city community of rich and varied topography and architecture. In recent years dramatic population shifts and a pattern of economic disinvestment have contributed to the rapid decline of the physical and social fabric of this once splendid area. In 1967 a community based group of activists formed The Roxbury Action Program with the intention of arresting the decline and establishing a model community including a revitalized housing stock and quality schools, parks and shopping. For more than five years Stull Associates has served as the principal planning consultant and architect for this program. The evolving and comprehensive plan seeks to interface ideological goals and practicalities of implementation. Highland Park projects underway within the Stull Office include a major mixed use development in John Eliot Square and a 5000 student community college.

HIGHLAND PARK REDEVELOPMENT


PEDESTRIAN MOVEMENT
& ACTIVITY NETWORK
PEDESTRIAN ROUTES
AREAS OF UNSATISFACTORY LAYOUT & ENVIRONMENT NEEDING IMPROVEMENT
HARD URBAN SPACES
SOFT URBAN SPACES
BUILDINGS OF ARCHITECTURAL AND HISTORIC SIGNIFICANC
BUILDINGS OF HISTORIC IMPORTANCE
0
200
400
600
HIGHLAND PARK
NPS

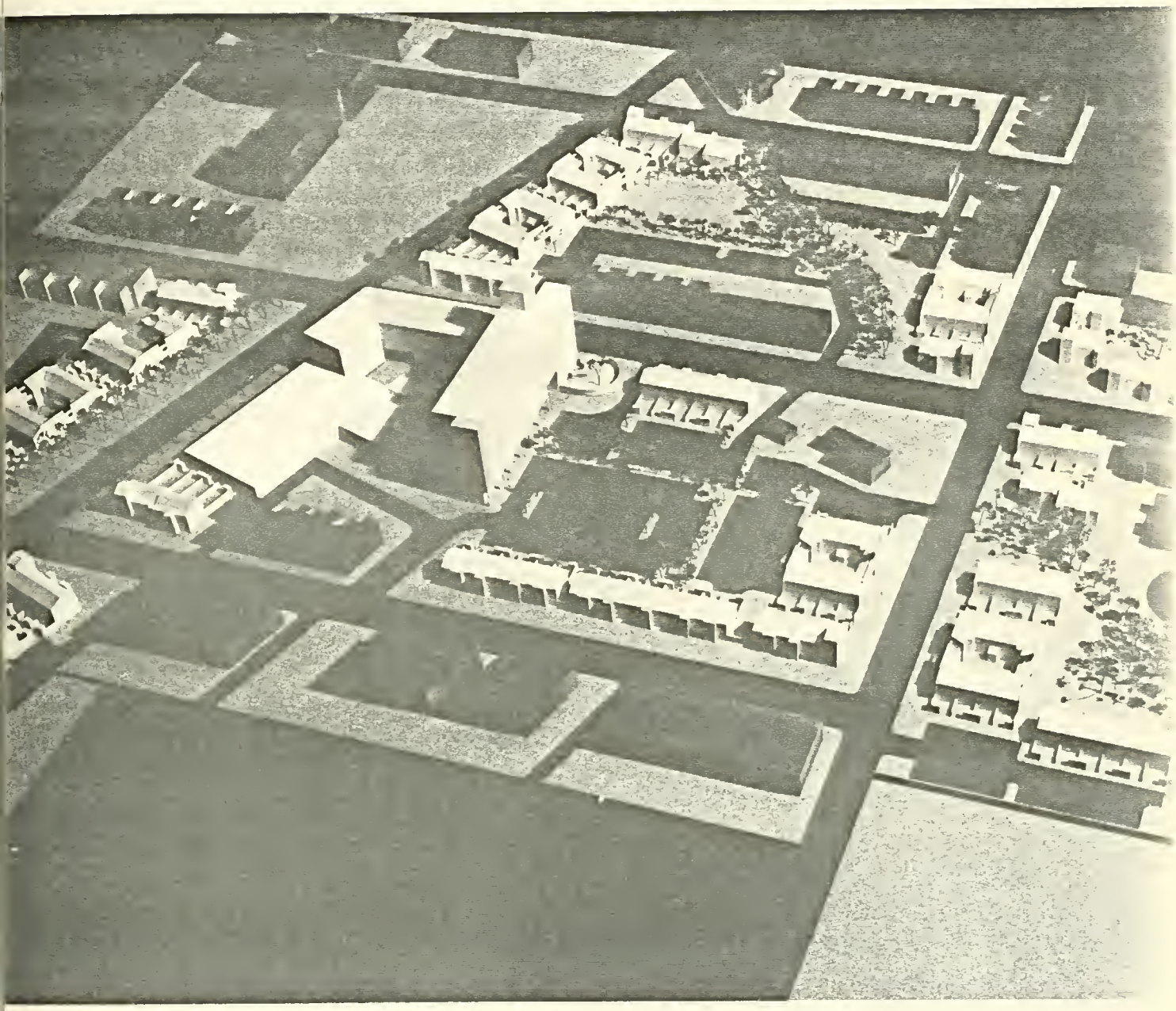


ROXBURY ACTION PROGRAM
RAP·UP IIA
STULL ASSOCIATES INC.



A master plan and preliminary design for the major redevelopment of the Oliver District of Baltimore, Maryland. Included are 320 mixed residential units, a neighborhood shopping center, parks and recreational development and institutional facilities. During analysis and design the Stull Office coordinated the inputs of local resident interests, the Baltimore Department of Housing and Community Development, the financing agency, and the general contractor and developer. The work is a major urban design effort attempting to re-establish an existing urban fabric, character and scale found throughout the District. Project completion is projected for mid-summer 1977.

OLIVER URBAN RENEWAL DISTRICT



The Stull Partnership
Architects
195 State Street
Boston, Massachusetts

Owner:
Interfaith Housing Corporation

Design director:
Don Stull

Project director:
Stephen Tise

Structural:
Sepp Firnkas Engineering

Mechanical:
Samuel Lesburg Associates

Electrical:
Goodall Shapiro Associates

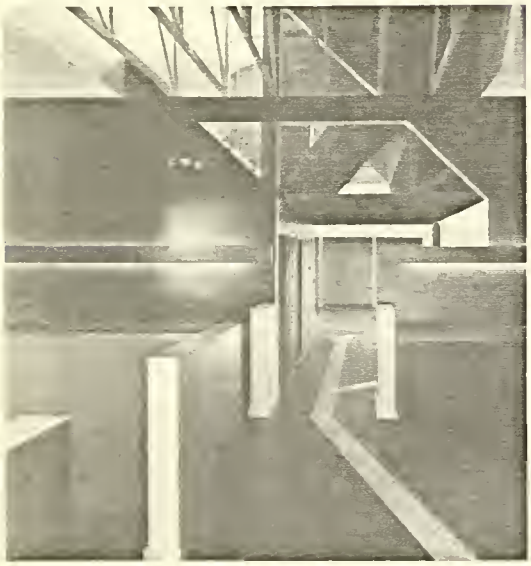
Landscape:
Shurcliff, Merrill & Footit

Photographer:
George Zimberg

Construction completed:
December 31, 1971

Construction cost:
$1,272,000

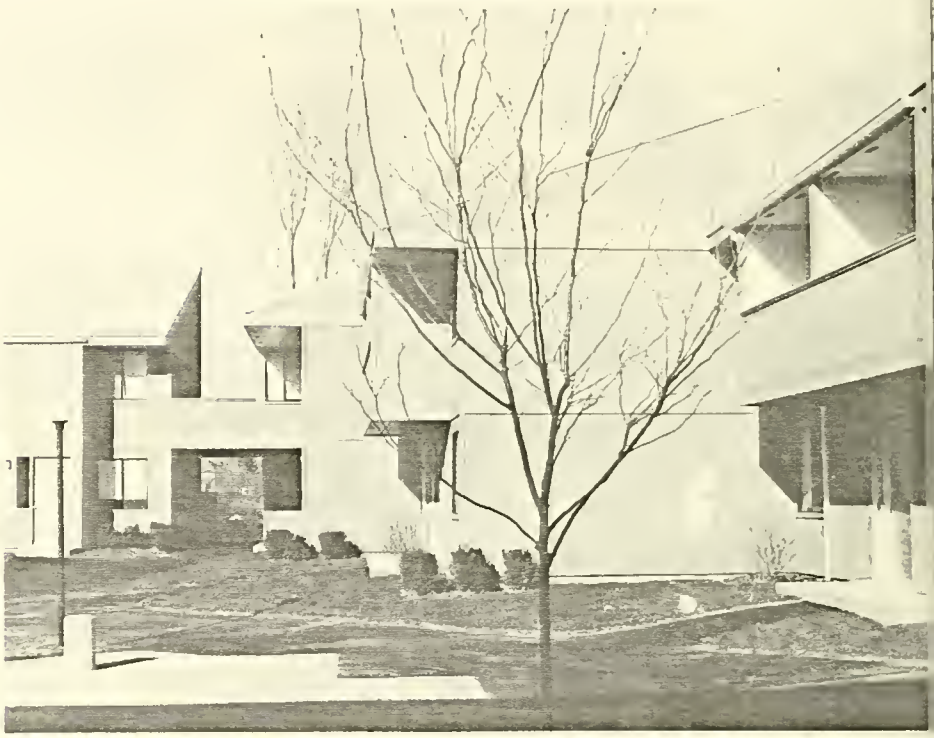
Published:
Apartment Construction News
April 1973

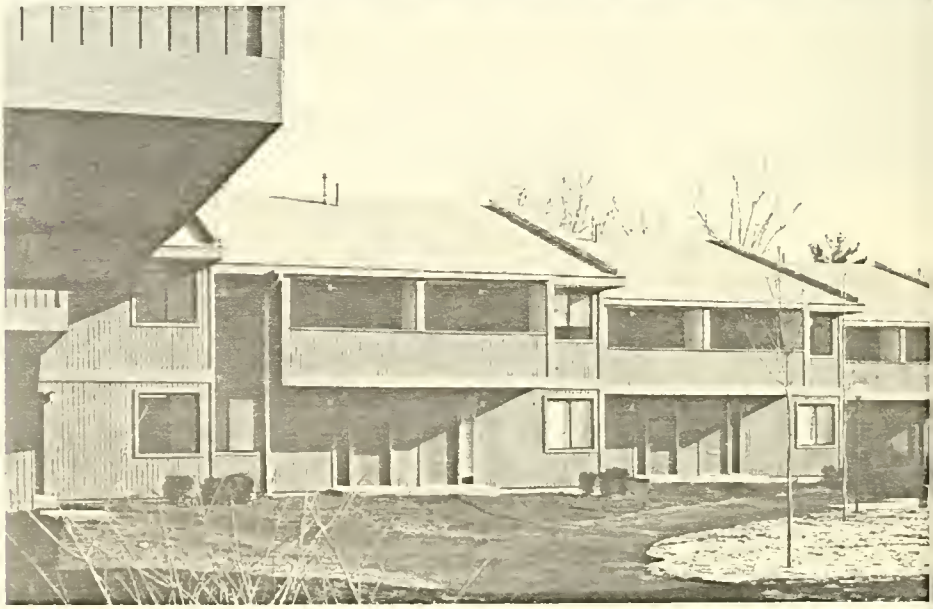


Presidential Courts
Stoughton, Massachusetts

Presidential Courts is a 104 unit family housing cooperative made up of 16 wood frame buildings grouped into four clusters on 10 acres of land in the Stoughton suburb of Boston. The development is organized around a pedestrian path connecting an adjacent school complex with neighborhood shopping.

An on-site community building contains laundry, office, meeting room, and attendant apartment. The cooperative was developed under the HUD 236 interest rate subsidy program.





: Stull Partnership
hitects
State Street
ton, Massachusetts

er:
Micah Corporation

gn director:
Olson

ect director:
dy Lewis

ctural:
ur Choo

nanical:
uel Lesburg Associates

rical:
dall Shapiro Associates

iscape:
cliff, Merrill & Footit

ographer:
Wheeler

truction dates:
mber 1970 to January 1971

truction cost:
33,000

Liberty Hill
Springfield, Massachusetts

Liberty Hill is an 88 unit co-op development of townhouses on two sites totalling 4.5 acres and located in the West End Urban Renewal area of Springfield.

The townhouses are grouped around a central yard containing play and park areas and separated from adjacent parking. A commons building houses laundry, maintenance and offices, and a meeting room which also functions as a day care center.

The wood frame townhouses were developed using the FHA 236 interest rate subsidy program.

The Stull Partnership
Architects & Planners
431 Marlborough Street
Boston, Massachusetts

Owner:
N.Y.C. Urban Development Corporation

Design director:
Stephen Tise

Project director:
Charles Perez

Project architect:
Geoffrey Turner

Structural:
Ewell Finley

Mechanical & electrical:
Flack & Kurtz

Landscape:
CR3

Photographer:
Norman McGrath

Construction completed:
August 1975

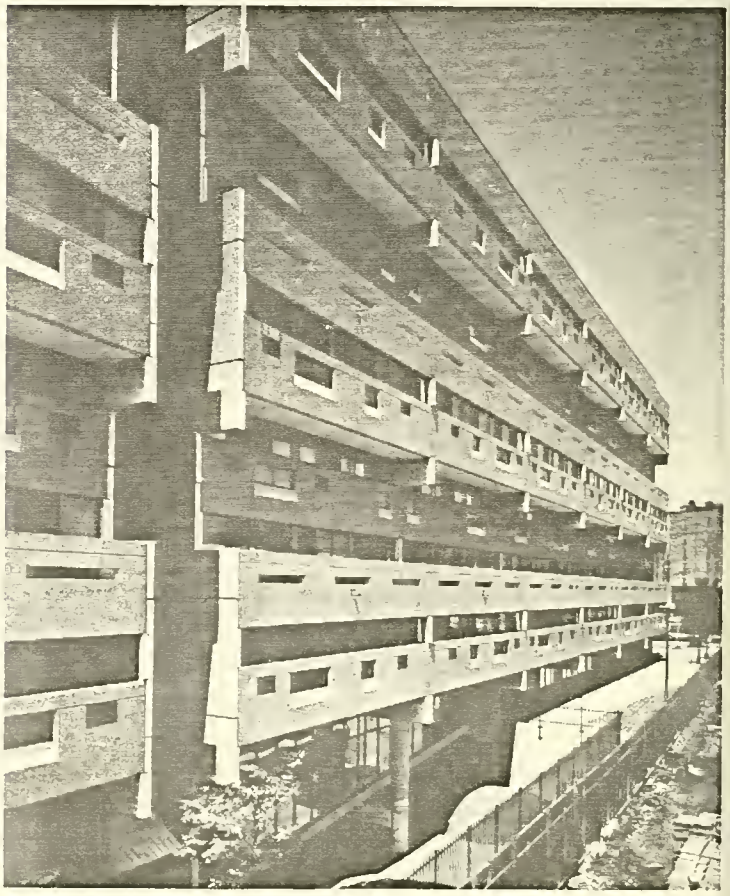
Construction cost:
$16,600,000

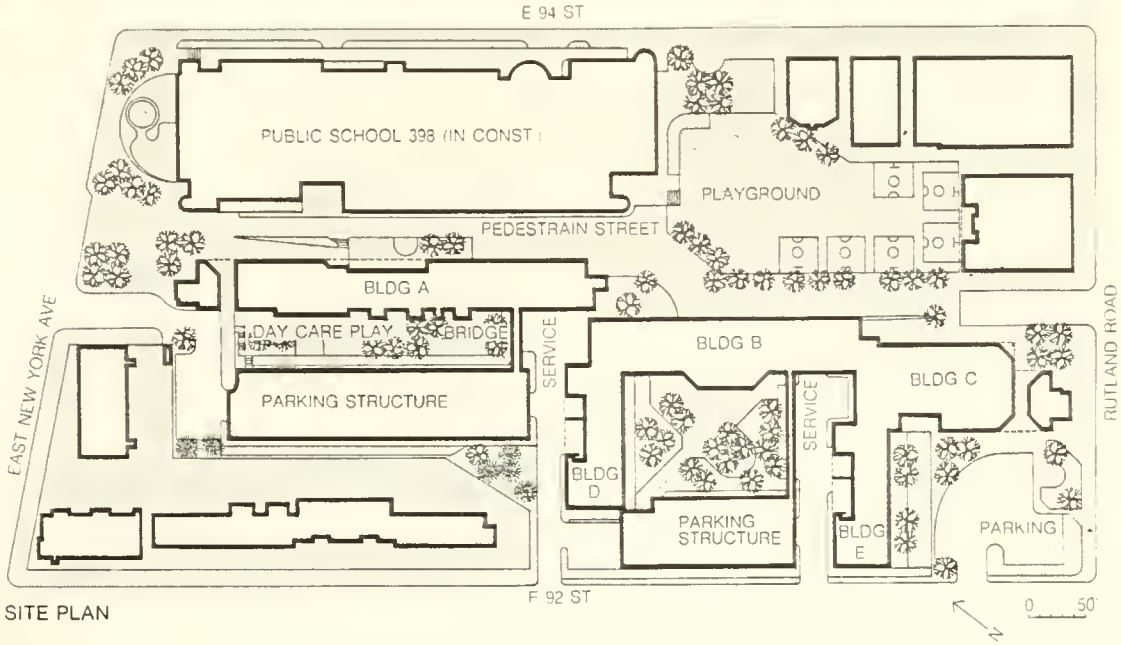
Published:
Progressive Architecture
March 1976

Awards:
Concrete Industry Board
1975

Rutland Road Houses
Brooklyn, New York

This multi-family housing development is the major component of a 7½ acre urban renewal site in Brooklyn, New York. The master plan calls for the closing of a cross-street and the construction of a new elementary school and neighborhood playground in addition to the housing and community facilities. Ground levels contain commercial and community related uses with entrances on a new pedestrian street. Private courtyards and parking decks are located on the opposite side. Bridges from the parking structures penetrate the housing and open onto the pedestrian street. Most family apartments are duplex types; public corridors are placed at every third level. Elderly units are located on the first three levels of the southernmost building with a separate elevator and private lobby adjacent to commercially oriented Rutland Road. The development is assembled from prefabricated concrete components, and a total of 438 housing units, 25,000 square feet of commercial and activity spaces, and 53,000 square feet of structured parking are provided. Fast track construction techniques were utilized, and 440,000 square feet of structural frame including exterior walls required 11 months from start of fabrication to completion of erection.




E 94 ST
PUBLIC SCHOOL 398 (IN CONST.)
PLAYGROUND
PEDESTRAIN STREET
BLDG A
DAY CARE PLAY
BRIDGE
PARKING STRUCTURE
SERVICE
BLDG B
BLDG C
SERVICE
BLDG D
PARKING STRUCTURE
BLDG E
PARKING
EAST NEW YORK AVE
RUTLAND ROAD
F 92 ST
0 50'
N

SITE PLAN

Stull Associates
Architects and Planners
Boston, Massachusetts 02116

Owner
City of Boston
Dept. of Public Facilities

Design director
John Olson

Project director.
Jim Velleco

Job captain.
Joe Grazado

Structural.
Souza & True, Inc

Mechanical.
Samuel Lesburg Associates

Electrical
Goodall Shapiro Associates

Landscape
KLC, Inc.

Programming.
Mark Mitchell

Projected cost
$6,500,000

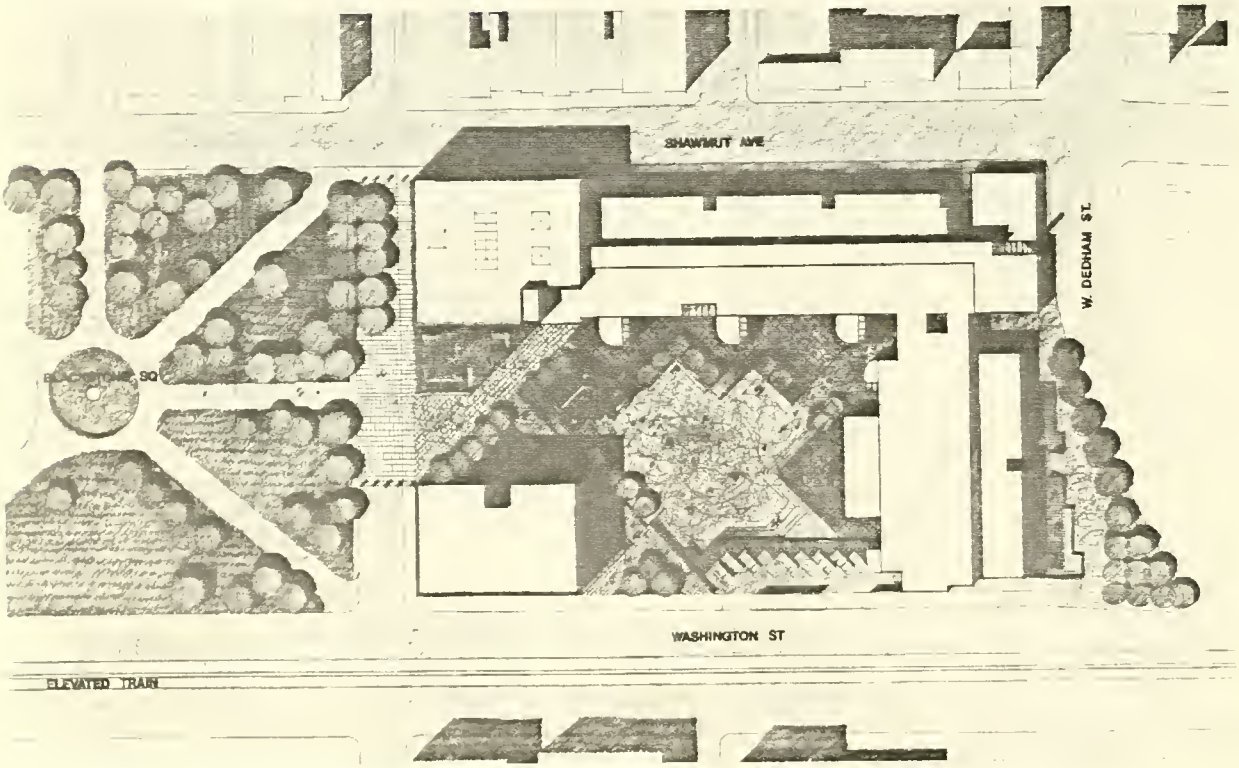
Published
Architectural Forum
October 1972

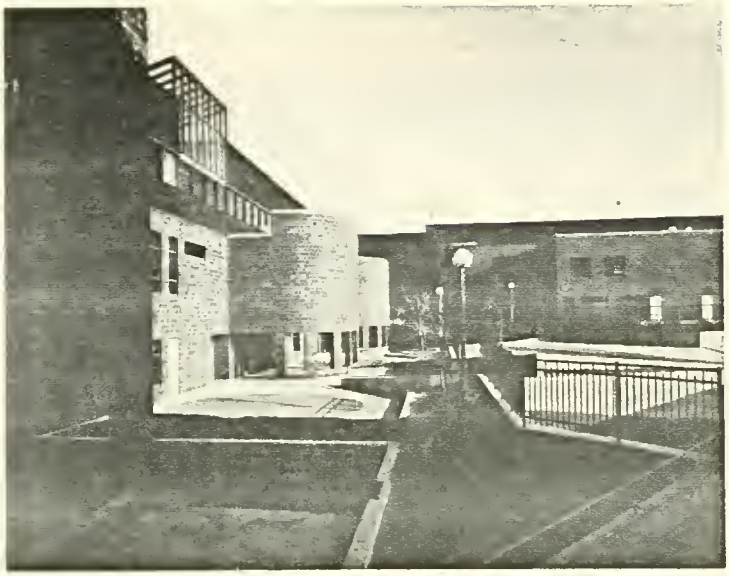
Blackstone Square Elementary School
South End, Boston, Massachusetts

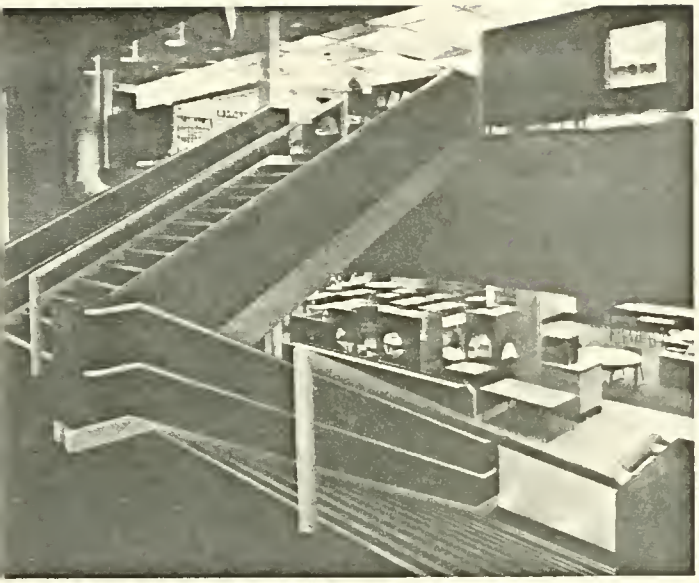
Blackstone Square is an elementary school for 1000 students based on a program developed by neighborhood initiative. The school is subdivided into five autonomous nongraded "houses," each having its own entry and architectural identity. Central facilities are along the upper level "street" which connects all the houses and the renovated Williams Building. These include a media center, science center, cafeteria, community clinic, auditorium, music and seminar rooms, and gymnasium.

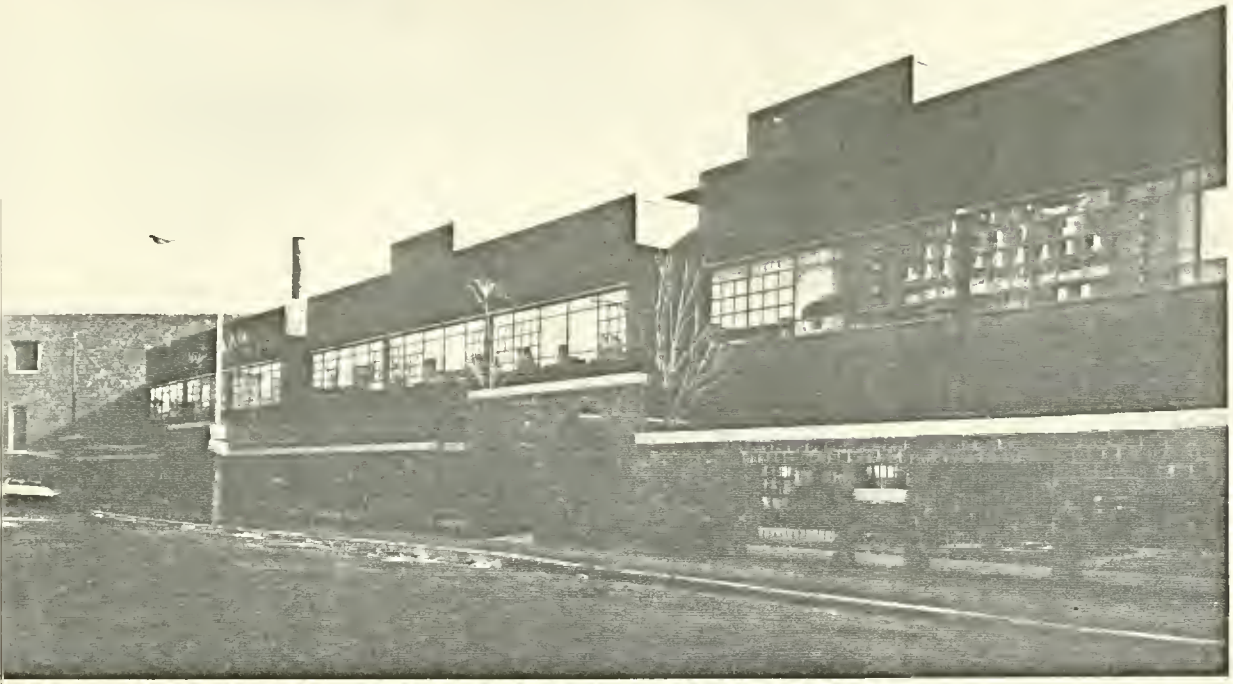
The school will function as a neighborhood facility offering recreational activities, evening and summer continuing education and a bilingual program. Construction is steel frame with brick and steel panel exterior. Blackstone Square is designed within Boston's Bostco Track II systems school program.

The four acre site is within the South End Urban Renewal area adjacent to historic Blackstone Square.









Stull Associates
Architects and Planners
Boston, Massachusetts 02116

Owner
City of New Haven

Design director:
Don Stull

Project director:
David Lopatich

Job captain:
Fred Warren

Structural:
Finley & Madison Associates

Mechanical:
E.J. Flynn Associates, Inc.

Electrical:
Lottero & Mason Associates, Inc.

Landscape:
Dan Kiley & Partners

Published:
Progressive Architecture 1978

Jackie Robinson Middle School
New Haven, Connecticut

New Haven, Connecticut, administers a program of neighborhood related "community" schools intended to serve as educational, recreational, service and cultural centers.

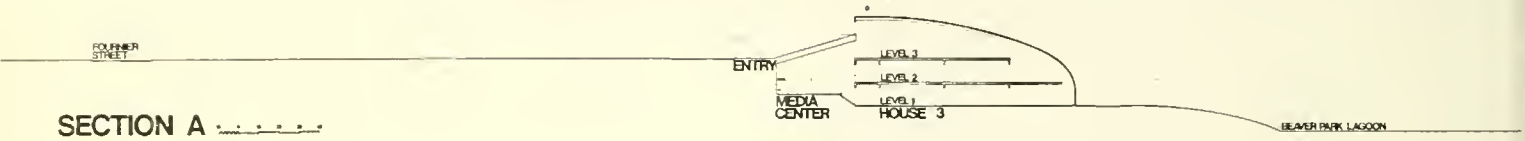
Newhallville 5-8 is one of the first new Middle Schools within this program.

Architectural work included educational and space use programming funded by EFL.

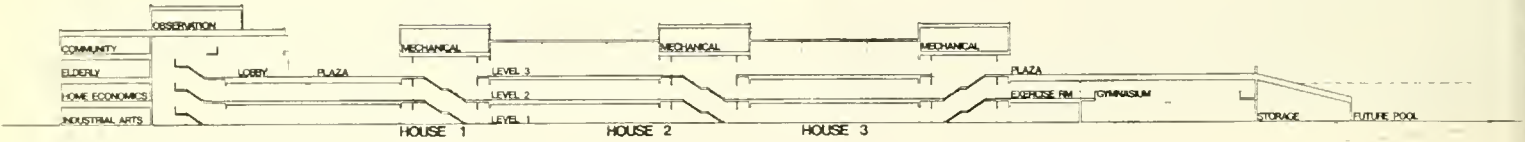
The School is sited on parkland located between a single family residential area and Connecticut State Teachers College, which is separated from the site by a small lagoon.

The building is placed against the hillside overlooking the lagoon and College beyond in an attempt to minimize its impact on the land and adjacent residential neighborhood.

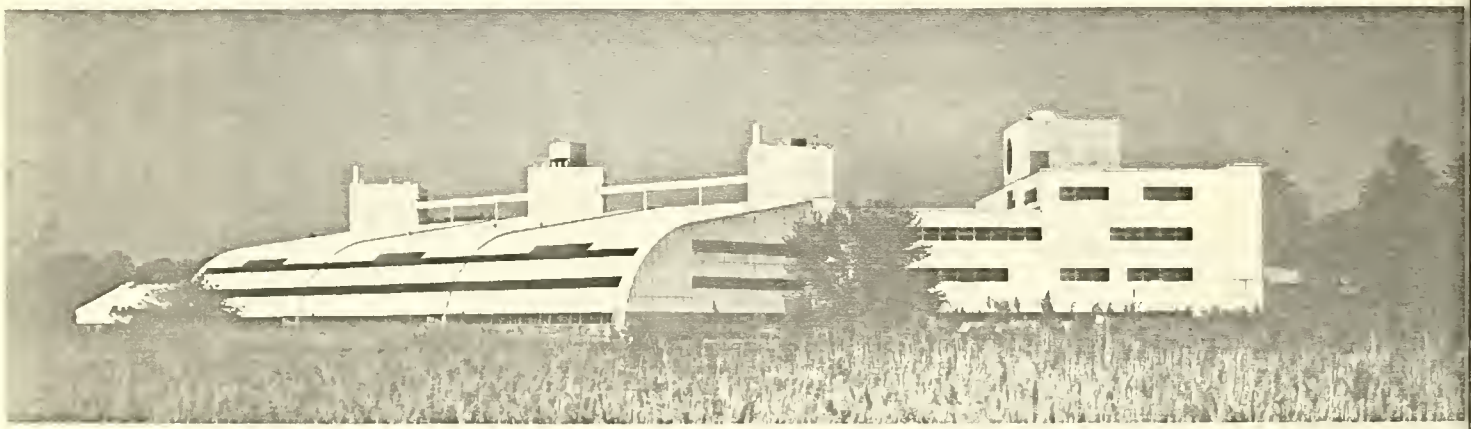
Three separate elements contain "Unified Arts" and Administration, Instructional, and Physical Education. The Instructional element is further sub-divided into academic "houses" organized vertically and equally accessible to multi-media facilities.

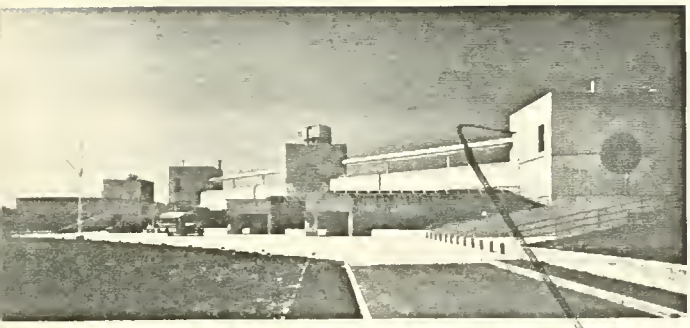


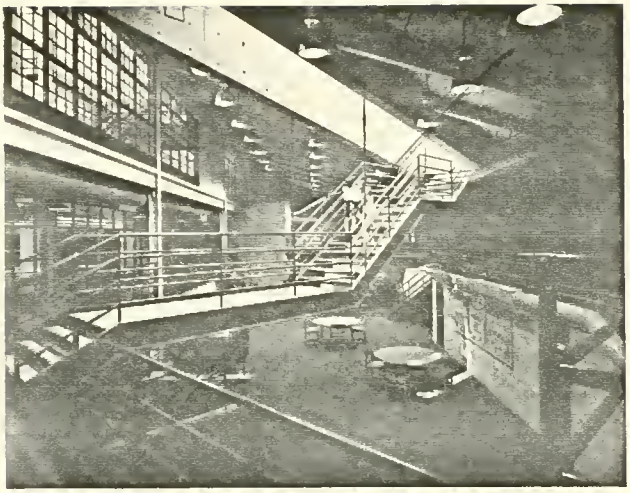
SECTION A

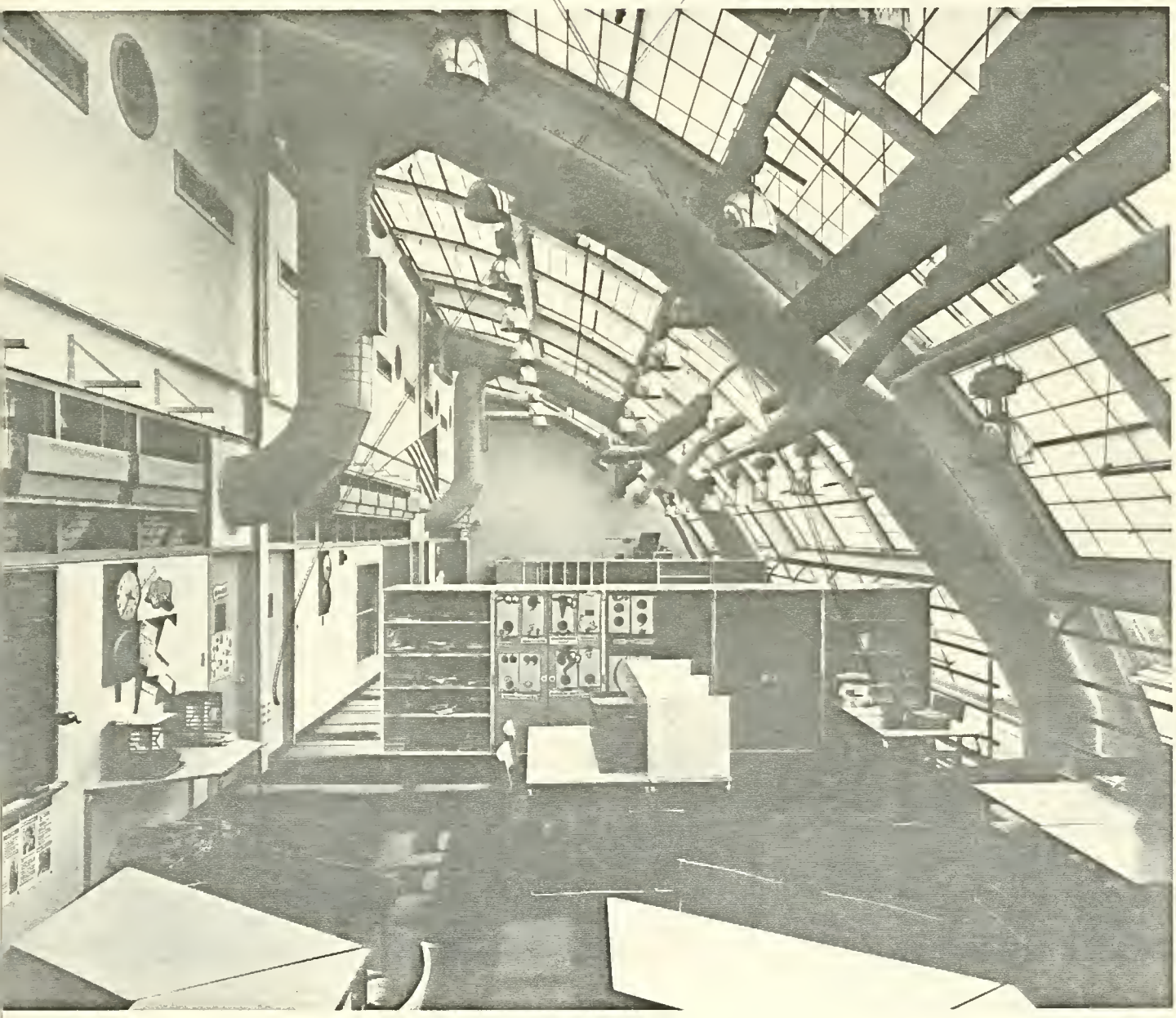


SECTION B









The Stull Partnership
Architects & Planners
431 Marlborough Street
Boston, Massachusetts

Owner:
United South End Settlements

Design director:
Don Stull

Project director:
Charles Perez

Project architect:
Mark Wilhelm

Structural:
Arthur Choo Associates

Mechanical:
M.A.C.E.

Electrical:
Goodall Shapiro Associates

Landscape:
K.L.C. Inc.

Kitchen consultant:
Richard E. Deraney

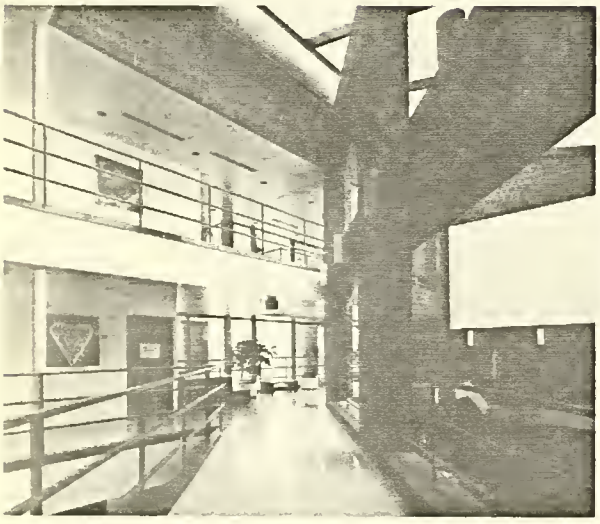
Photographer:
Jim Raycroft

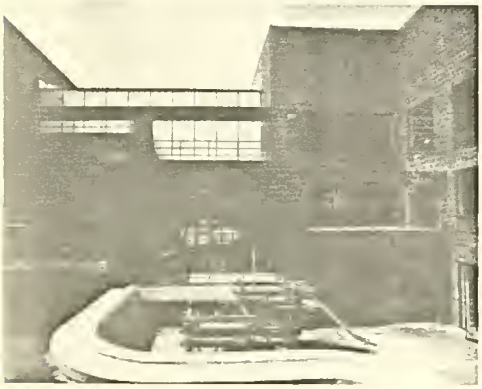
Construction completion:
May 1976

Construction cost:
$1,850,000

The Harriet Tubman Center
Boston, Massachusetts

The Harriet Tubman Center is a facility for neighborhood services serving residents of Boston's historic South End district. Operated by United South End Settlements, one of the city's oldest social service organizations, the building provides office and meeting spaces for local welfare and employment agencies, legal aid and tenant counsels, and elderly and day care facilities. The building form compliments the scale and texture of adjacent three and four story brick townhouses. The design incorporates a three story multi-purpose space, with pedestrian bridges and skylights allowing visual interaction among the building's inhabitants.





Stull Partnership
itects
State Street
on, Massachusetts

:
Development Corporation

director:
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director:
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irnkas Engineering

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l Lesburg Associates

cal:
ll Shapiro Associates

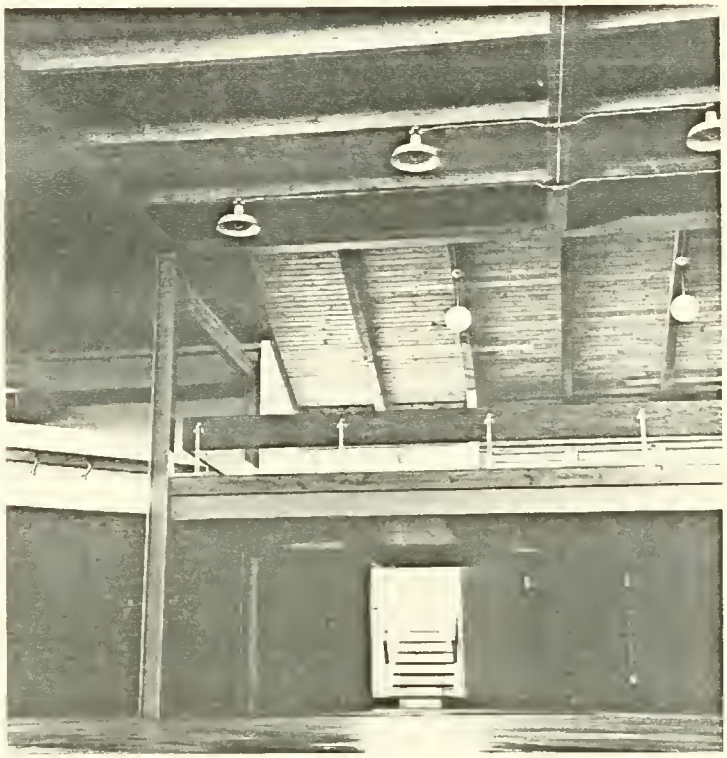
ape:
ff, Merrill & Footit

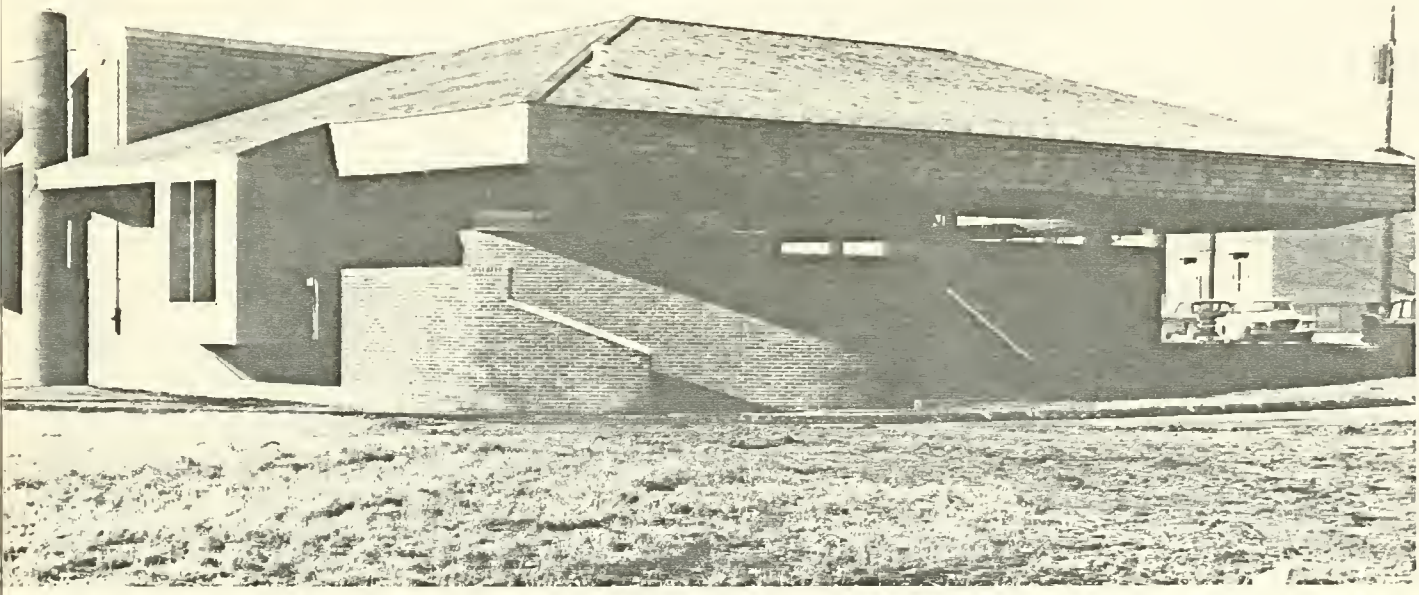
uction complete:

uction cost:
0

West Haven Community Building
West Haven, Connecticut

The West Haven Community Building is a recreation facility constructed ancillary to a housing development in West Haven, Connecticut. It includes spaces for team sports, basketball, and smaller meeting rooms and offices.





The Stull Partnership
Architects & Planners
431 Marlborough Street
Boston, Massachusetts

Owner:
Development Corporation of America

Design director:
Don Stull

Project director:
Stephen Tise

Structural:
Sepp Firnkas & Associates

Mechanical:
Samuel Lesburg & Associates

Electrical:
Goodall Shapiro & Associates

Photographer:
Jim Raycroft

Construction completed:
September 1969

Construction cost:
$1,500,000

Sears Crescent Building
Boston, Massachusetts

Sears Crescent is the oldest standing structure in Boston's award winning Government Center. Renovated in 1969, the 50,000 square foot structure once contained America's oldest continuously operating booksmith, and is numbered among Boston's numerous landmarks. Recycled for efficient contemporary use, the Sears Crescent is an example of the City's recent attempt to preserve its historic structures in functional rather than museum related uses.

Containing a bank, pub, restaurants, offices, and improvisational theater, Sears Crescent forms the southern boundary of Boston's City Hall Plaza. A sidewalk cafe extends the restaurant activity onto the Plaza, and provides an animated edge to the adjacent expanse of brick paving.

l Associates
ıitects and Planners
:on, Massachusetts 02116

:
ıtional Business Machines

ı director
ı Stull

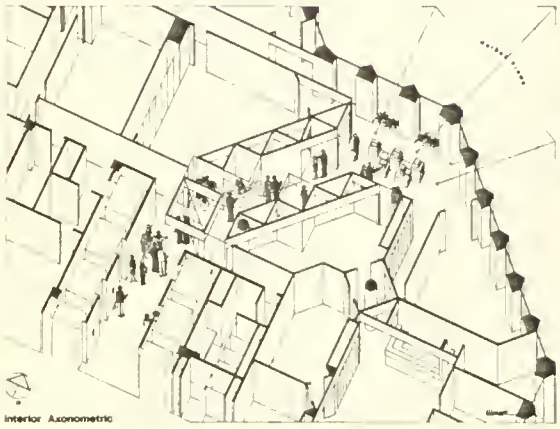
ı director
s Perez

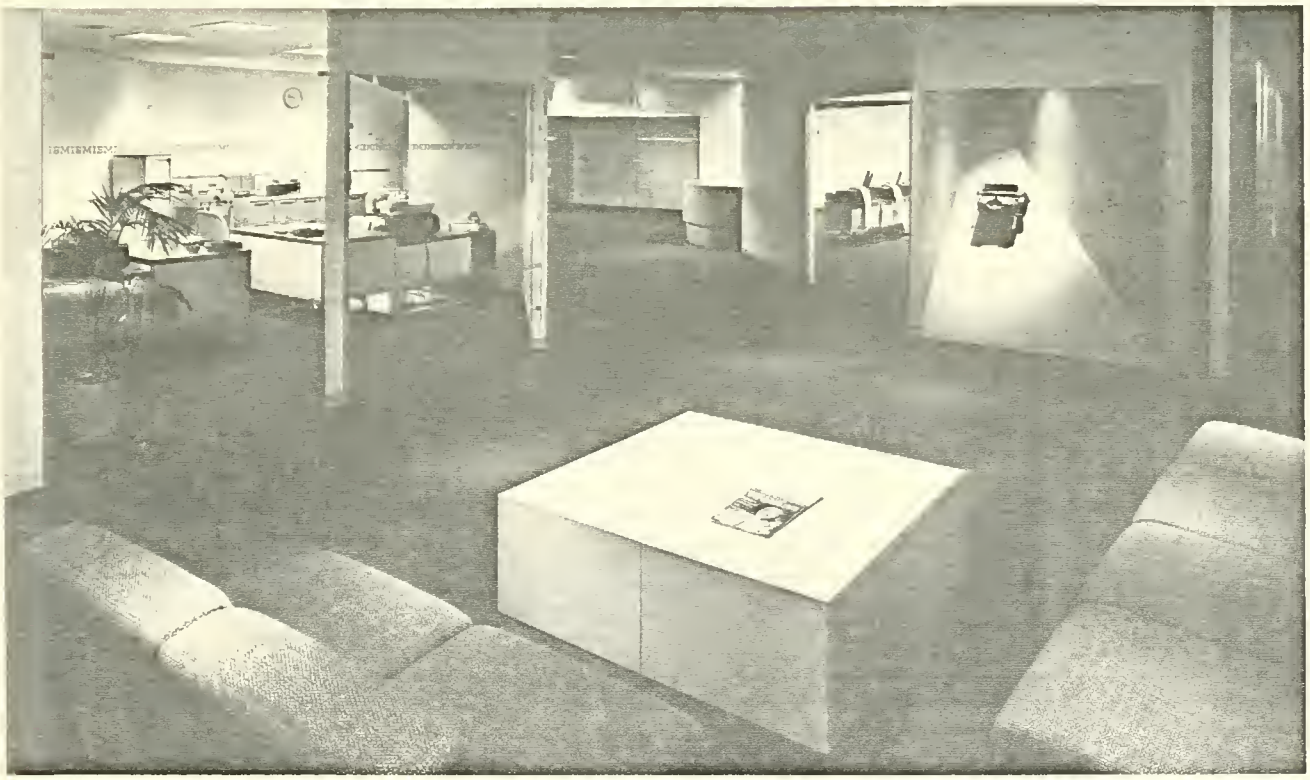
ınical.
Curry

ıg.
ı Lam Associates

IBM Office — 60 State Street
Boston, Massachusetts

The office products branch of IBM in Boston is one solution to an interior design problem strongly controlled by a building's geometric form. The floor occupied has a notched-out shape caused by the building's sculptured perimeter, designed to minimize loss of views of surrounding buildings in the City's Government Center. To avoid interior disorientation and to provide a large number of client requested enclosed spaces (perimeter offices, and training, product demonstration and lunch rooms) the main corridors were aligned with views to both the north/south and east/west directions. Support functions were open planned and positioned in areas with views. The entrance is a glass cube that juts out at one corner of the elevator lobby and is set diagonally to the other office space, directing visitors to the reception area and their line of sight to a prime harbor view. The theme of glass square and half-square forms were used only at other corridor intersections that signal a transition from one direction to another. These points are reinforced by a change in carpet and soffit construction.


Interior Axonometric



The Stull Partnership
Architects & Planners
431 Marlborough Street
Boston, Massachusetts

Design director:
John Olson

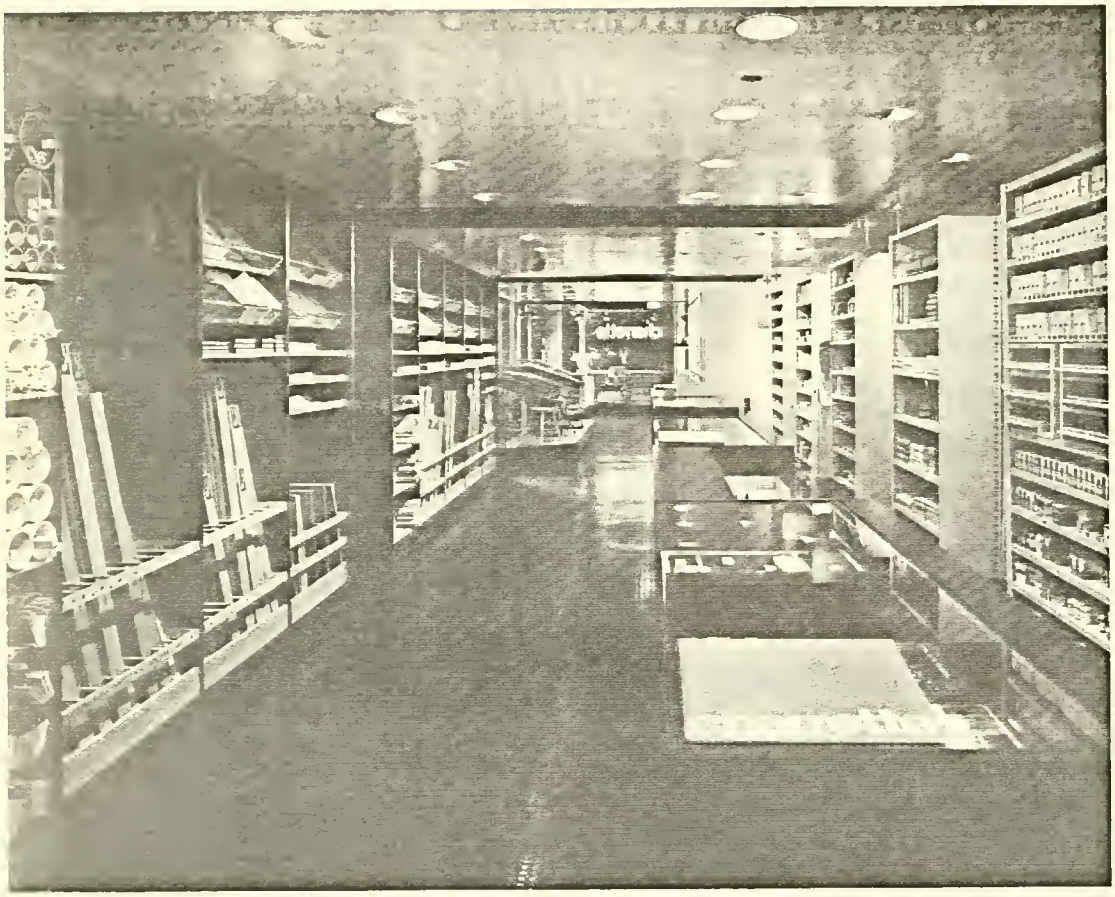
Builder:
F. J. Rooney Construction

Construction cost:
Witheld at owner's request

Photographer:
Steve Rosenthal

Charrette Corporation
Cambridge, Massachusetts

Charrette Corporation is an expanding architectural and art supply company in New England. A new facility was constructed to serve the Cambridge area. Stull Associates carefully designed a restrained background environment to display a diversity of products ranging from transfer lettering to European drafting furniture. A second facility in downtown Boston is currently under construction.



HOUSING

General

Over the past thirty-two years Moriece & Gary, as land planners and landscape architects in collaboration with architects and engineers, have planned, designed and supervised the construction of sites for thousands of housing units. The scope of services includes:

- Site Analysis
- Master Planning
- Cost Estimating and Scheduling
- Contract Documents
- Construction Supervision

The majority of housing has been constructed in the New England and Mid-Atlantic States with a few developments along the eastern seaboard and Virgin Islands. In addition to housing the firm's work has included a complete range of community, commercial and recreational related facilities including colleges, parks and shopping centers.

Housing Classifications, Types and Clients

The firm's experience has included the following classifications of housing developments:

- Resort
- Elderly
- Low-Income
- Veterans
- Military
- Luxury
- College

with a wide range of building types

- Single Family Detached
- High and Mid-rise
- Garden Apartments
- Town Houses
- Patio Houses

arranged on sites containing from fifty to over one thousand units. Clients have been a balance from the public and private sector including the following:

Public: F.H.A.
Massachusetts Housing and Finance Authority
Navy
Army Corps of Engineers
U.D.C. (New York)
Veterans Administration
H.U.D.
D.C.A. (Massachusetts)

Private: Kaufman and Broad
Spaulding and Slye (Boston)
Boston Development Associates
AIRCOA
Endevor, Inc.

Colleges: Tufts University
Springfield College
Dartmouth College

Awards

Moriece & Gary's housing projects have won numerous national and regional awards including:

Millpond, North Andover, Massachusetts
New England Village, Burlington, Massachusetts
Wellesley Green, Wellesley, Massachusetts
Sparks Street Apartments, Cambridge, Massachusetts
Linden Square Town Houses, Wellesley, Massachusetts

Projects

General

The following is a selected list of general housing developments constructed (C) or in the planning stage (P):

Glover Landing (C), Marblehead, Massachusetts (120 units)
Arverne (C), New York City (1,000 units -- high rise)
Wellesley Green (C), Wellesley, Massachusetts (110 units)

Pochung Mountain Farms (P), Ve[illegible]n, New Jersey (resort, P.U.D.)
Walden Square (C), Cambridge, Massachusetts (pedestrian mall)
Greenbrook (C), Stoughton, Massachusetts (500 town houses)
Millpond Townhomes (C), North Andover, Massachusetts (140 units)
Family Housing (C), West Point, New York, U.S. Military Academy (200 units)
Linden Square (C), Wellesley, Massachusetts (town houses)
Hummock Pond (P), Nantucket, Massachusetts (P.U.D.)
Highland Green (P), Salem, Massachusetts (Kaufman and Broad, 2,000 units)
Halibut Point (P), Rockport, Massachusetts (resort)
Quechee Village (C), Vermont (resort)
Bretton Woods (C), Mt. Washington, New Hampshire (resort)
St. Croix (C), Virgin Islands (elderly)
Sea Hill (P), Plymouth, Massachusetts (750 units, resort, P.U.D.)
Hillside Housing (C), Tufts (220 units)
Wedgewood Place (C), Winchester, Massachusetts (42 units)
New Townhouses (P), Norwell, Massachusetts (150 town houses)
Greenridge (C), Lincoln, Massachusetts

Elderly Housing

Since 1948, Moriece & Gary, Inc., has worked as land planning and landscape architectural consultants to architects on housing for the elderly constructed in the following communities. These projects have been under the direction of the following agencies: MHFA, FHA (New York), State Housing Authority, DCA and HUD.

Amherst (Clarke House)
Ashland
Bennington, Vermont
Billerica
Braintree
Brockton
Brunswick, Maine
Chelmsford
Chelsea
Gloucester
Falmouth
Fitchburg
Franklin
Gardner
Malden
Manchester, New Hampshire
Melrose
Monticello, New York
New Bedford
Newburyport
Newton
Norwood
Pembroke
St. Croix, Virgin Islands
South Portland, Maine
Whitman
Whitinsville
Worcester (2 projects)

CIVIC BUILDINGS AND URBAN PLANNING

Public buildings are often the major edifices in the urban landscape. They include libraries, civic centers and courthouses. The design and site development of these buildings determine the shape and character of a community. Listed below are civic buildings for which Moriece & Gary has designed the landscape in collaboration with the architect. Also included in this list are a number of urban planning projects which consist of plans and studies as well as built designs.

CIVIC BUILDINGS

COURT HOUSE
Wrentham, Massachusetts

UNITED STATES EMBASSY
Tangiers, Africa

PUBLIC LIBRARY
Lincoln, Massachusetts

FIRE STATION
Abington, Massachusetts

INTERNAL REVENUE SERVICES
Andover, Massachusetts

MIDDLESEX COUNTY COURT HOUSE
Cambridge, Massachusetts

FIRE STATION
Scituate, Massachusetts

PUBLIC LIBRARY
New Bedford, Massachusetts

COURT HOUSE
Woburn, Massachusetts

MUSEUM OF FINE ARTS
Boston, Massachusetts

PEABODY LIBRARY
Danvers, Massachusetts

FIRE STATION
Boston, Massachusetts

POLICE STATION
Marshfield, Massachusetts

BOOT AND SHOE MUSEUM
Brockton, Massachusetts

POLICE STATION
Weston, Massachusetts

BEVERLY YMCA
Beverly, Massachusetts

FIRE STATION
Westwood, Massachusetts

POST OFFICE
Stoughton, Massachusetts

PORTLAND PUBLIC SAFETY
Portland, Maine

FIRE STATION
Brockton, Massachusetts

PUBLIC LIBRARY
Belmont, Massachusetts

WOBURN YMCA
Woburn, Massachusetts

POLICE STATION
Medfield, Massachusetts

POST OFFICE
Marblehead, Massachusetts

POLICE STATION
Braintree, Massachusetts

POST OFFICE
Marshfield, Massachusetts

URBAN PLANNING

UPTON BEAUTIFICATION PROGRAM
Upton, Massachusetts

STOW BEAUTIFICATION PROGRAM
Stow, Massachusetts

HANOVER BEAUTIFICATION PROGRAM
Hanover, Massachusetts

VERMONT BEAUTIFICATION PROGRAM
Burlington, Vermont

CAMBRIDGE BEAUTIFICATION PROGRAM
Cambridge, Massachusetts

HAMPDEN BEAUTIFICATION PROGRAM
Hampden, Massachusetts

HARVARD SQUARE - BRATTLE WALK
Cambridge, Massachusetts

GROVELAND CIVIC CENTER
Groveland, Massachusetts

HULL URBAN RENEWAL REPORT
Hull, Massachusetts

RECREATION AND OPEN SPACE

As landscape architects, Moriece and Gary, Inc., from 1948 on have planned and designed the development of recreation and open space for the following communities. Although certain commissions consisted primarily of Master Planning, most of the projects listed were constructed under the inspection of this company.

In addition, over 250 school sites have been designed and constructed containing playfields, play equipment, tennis courts, running tracks and other recreation facilities.

* Projects Constructed

MASSACHUSETTS

Amherst	* Tennis Center, University of Massachusetts
Arlington	* North Union Playground
	* Pheasant Avenue Playground
	* Poet's Corner Playground
	Spy Pond Shore
Boston	* Charlesgate Park Area
	Franklin Park Zoo
	* Museum of Fine Arts Court
	Washington Street Mall
Bridgewater	* Athletic Complex, Bridgewater State College
Canton	Community Swim Shed
Cambridge	* Broad Canal Rest Area
	* Clarendon Avenue Park
	* Elm/Hampshire Streets Park
	Hamden Street Playground
	Harvard Square Pedestrian Plaza
	* Palmer Street and Harvard Trust Terrace
	* Riverside Press Park

Cambridge	* Walden Square Recreation Area * Washington Memorial
Chelsea	* Malone Park
Concord	Millbrook Open Space Report
Hamden	Open Space/Urban Beautification Plan
Hanover	Open Space/Urban Beautification Plan
Holyoke	Pequot Ponds Recreation Plan (D.N.R.)
Hopkinton	* New England Laborers' Academy Recreation Center
Marlborough	Master Open Space/Recreation Master Plan
Medford	Mystic River Basin Master Plan (M.D.C.)
New Bedford	* Library Park (Public Library)
Revere	* Point of Pines Park
Sharon	* Town Waterfront Recreation Area
Stow	Open Space/Urban Beautification Plan
Upton	Open Space/Urban Beautification Plan
Wayland	* Tennis Center (High School) * Conservation Master Plans for Sudbury Valley Trustees Land (B.O.R.)
Wellesley	* Wellesley Country Club Master Plan
Weston	* Golden Ball Tavern Gardens
Woburn	Library Park Study
Wrentham	* Knuck-up Hill Park

NEW HAMPSHIRE

Portsmouth	* Prescott Park

NEW YORK

Monticello	* Kutschers Country Club
Queens	* Recreation Courts, Arverne Housing

NORTH CAROLINA

Durham	* Duke University Gardens

RHODE ISLAND

North Kingstown	Narrow River Master Plan

VERMONT

Burlington	Open Space/Recreation Master Plan

WASHINGTON, D.C.

Washington	* Downtown Streets for People

STANDARD FORM (SF) **254**

Architect-Engineer and Related Services Questionnaire

1. Firm Name / Business Address:

Moriece & Gary, Inc.
25 Mount Auburn Street
Cambridge, Massachusetts 02138

1a. Submittal is for ☒ Parent Company ☐ Branch Office

2. Year Present Firm Established: 1956

3. Date Prepared: October 29, 1982

4. Type of Ownership:

4a. Minority Owned ☐ yes ☒ no

5. Name of Parent Company, if any:

Same as No. 1 above

5a. Former Firm Name(s), if any, and Year(s) Established:

Chambers and Moriece -- 1948

6. Names of not more than Two Principals to Contact: Title / Telephone

1) Benjamin Walter Gary, Jr., President (617) 868-2314
2)

7. Present Offices: City / State / Telephone / No. Personnel Each Office

7a. Total Personnel 10

Moriece & Gary, Inc.
25 Mount Auburn Street
Cambridge, Massachusetts 02138
(617) 868-2314

8. Personnel by Discipline:

1 Administrative	___ Electrical Engineers	___ Oceanographers	___
___ Architects	___ Estimators	___ Planners: Urban/Regional	___
___ Chemical Engineers	___ Geologists	___ Sanitary Engineers	___
___ Civil Engineers	___ Hydrologists	___ Soils Engineers	___
___ Construction Inspectors	___ Interior Designers	___ Specification Writers	___
___ Draftsmen	9 Landscape Architects	___ Structural Engineers	___
___ Ecologists	___ Mechanical Engineers	___ Surveyors	___
___ Economists	___ Mining Engineers	___ Transportation Engineers	___

9. Summary of Professional Services Fees Received: (Insert index number)

Last 5 Years (most recent year first)

	1981	1980	1979	1978	1977
Direct Federal contract work, including overseas	0	0	0	0	0
All other domestic work	3	3	3	3	3
All other foreign work*	0	0	0	0	0

*Firms interested in foreign work, but without such experience, check here: ☐.

Ranges of Professional Services Fees

INDEX

1. Less than $100,000
2. $100,000 to $250,000
3. $250,000 to $500,000
4. $500,000 to $1 million
5. $1 million to $2 million
6. $2 million to $5 million
7. $5 million to $10 million
8. $10 million or greater

Experience Profile Code Numbers
for use with questions 10 and 11

001 Acoustics; Noise Abatement
002 Aerial Photogrammetry
003 Agricultural Development; Grain Storage; Farm Mechanization
004 Air Pollution Control
005 Airports; Navaids; Airport Lighting; Aircraft Fueling
006 Airports; Terminals & Hangars; Freight Handling
007 Arctic Facilities
008 Auditoriums & Theatres
009 Automation; Controls; Instrumentation
010 Barracks; Dormitories
011 Bridges
012 Cemeteries *(Planning & Relocation)*
013 Chemical Processing & Storage
014 Churches; Chapels
015 Codes; Standards; Ordinances
016 Cold Storage; Refrigeration; Fast Freeze
017 Commercial Buildings *(low rise)*; Shopping Centers
018 Communications Systems; TV; Microwave
019 Computer Facilities; Computer Service
020 Conservation and Resource Management
021 Construction Management
022 Corrosion Control; Cathodic Protection; Electrolysis
023 Cost Estimating
024 Dams *(Concrete; Arch)*
025 Dams *(Earth; Rock)*; Dikes; Levees
026 Desalinization *(Process & Facilities)*
027 Dining Halls; Clubs; Restaurants
028 Ecological & Archeological Investigations
029 Educational Facilities; Classrooms
030 Electronics
031 Elevators; Escalators; People-Movers
032 Energy Conservation; New Energy Sources
033 Environmental Impact Studies, Assessments or Statements
034 Fallout Shelters; Blast-Resistant Design
035 Field Houses; Gyms; Stadiums
036 Fire Protection
037 Fisheries; Fish Ladders
038 Forestry & Forest Products
039 Garages; Vehicle Maintenance Facilities; Parking Decks
040 Gas Systems *(Propane; Natural, Etc.)*
041 Graphic Design
042 Harbors; Jetties; Piers; Ship Terminal Facilities
043 Heating; Ventilating; Air Conditioning
044 Health Systems Planning
045 Highrise; Air-Rights-Type Buildings
046 Highways; Streets; Airfield Paving; Parking Lots
047 Historical Preservation
048 Hospitals & Medical Facilities
049 Hotels; Motels
050 Housing *(Residential, Multi-Family; Apartments; Condominiums)*
051 Hydraulics & Pneumatics
052 Industrial Buildings; Manufacturing Plants
053 Industrial Processes; Quality Control
054 Industrial Waste Treatment
055 Interior Design; Space Planning
056 Irrigation; Drainage
057 Judicial and Courtroom Facilities
058 Laboratories; Medical Research Facilities
059 Landscape Architecture
060 Libraries; Museums; Galleries
061 Lighting *(Interiors; Display; Theatre, Etc.)*
062 Lighting *(Exteriors; Streets; Memorials; Athletic Fields, Etc.)*
063 Materials Handling Systems; Conveyors; Sorters
064 Metallurgy
065 Microclimatology; Tropical Engineering
066 Military Design Standards
067 Mining & Mineralogy
068 Missile Facilities *(Silos; Fuels; Transport)*
069 Modular Systems Design; Pre-Fabricated Structures or Components
070 Naval Architecture; Off-Shore Platforms
071 Nuclear Facilities; Nuclear Shielding
072 Office Buildings; Industrial Parks
073 Oceanographic Engineering
074 Ordnance; Munitions; Special Weapons
075 Petroleum Exploration; Refining
076 Petroleum and Fuel *(Storage and Distribution)*
077 Pipelines *(Cross-Country—Liquid & Gas)*
078 Planning *(Community, Regional, Areawide and State)*
079 Planning *(Site, Installation, and Project)*
080 Plumbing & Piping Design
081 Pneumatic Structures; Air-Support Buildings
082 Postal Facilities
083 Power Generation, Transmission, Distribution
084 Prisons & Correctional Facilities
085 Product, Machine & Equipment Design
086 Radar; Sonar; Radio & Radar Telescopes
087 Railroad; Rapid Transit
088 Recreation Facilities *(Parks, Marinas, Etc.)*
089 Rehabilitation *(Buildings; Structures; Facilities)*
090 Resource Recovery; Recycling
091 Radio Frequency Systems & Shieldings
092 Rivers; Canals; Waterways; Flood Control
093 Safety Engineering; Accident Studies; OSHA Studies
094 Security Systems; Intruder & Smoke Detection
095 Seismic Designs & Studies
096 Sewage Collection, Treatment and Disposal
097 Soils & Geologic Studies; Foundations
098 Solar Energy Utilization
099 Solid Wastes; Incineration; Land Fill
100 Special Environments; Clean Rooms, Etc.
101 Structural Design; Special Structures
102 Surveying; Platting; Mapping; Flood Plain Studies
103 Swimming Pools
104 Storm Water Handling & Facilities
105 Telephone Systems *(Rural; Mobile; Intercom, Etc.)*
106 Testing & Inspection Services
107 Traffic & Transportation Engineering
108 Towers *(Self-Supporting & Guyed Systems)*
109 Tunnels & Subways
110 Urban Renewal; Community Development
111 Utilities *(Gas & Steam)*
112 Value Analysis; Life-Cycle Costing
113 Warehouses & Depots
114 Water Resources; Hydrology; Ground Water
115 Water Supply, Treatment and Distribution
116 Wind Tunnels; Research/Testing Facilities Design
117 Zoning; Land Use Studies
201 _____
202 _____
203 _____
204 _____
205 _____

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Prescribed By GSA Fed. Proc. Reg. (41 CFR) 1-16.803

Profile Code	Number of Projects	Total Gross Fees (in thousands)	Profile Code	Number of Projects	Total Gross Fees (in thousands)	Profile Code	Number of Projects	Total Gross Fees (in thousands)
010	5	30	11) 045	2	20	21) 062	3	20
014	5	20	12) 046	6	60	22) 072	2	28
017	5	26	13) 048	3	40	23) 078	2	20
023	50	60	14) 049	2	8	24) 079	12	60
028	1	20	15) 050	44	520	25) 082	3	15
029	24	200	16) 052	6	40	26) 087	2	160
033	2	12	17) 055	3	12	27) 088	38	1,960
035	4	35	18) 059	21	200	28) 096	2	30
036	5	25	19) 060	2	15	29) 104	12	120
041	4	14	20) 061	4	8	30) 117	6	15

11. Project Examples, Last 5 Years

Profile Code	"P", "C", "JV", or "IE"	Project Name and Location	Owner Name and Address	Cost of Work (in thousands)	Completion Date (Actual or Estimated)
050	C	1 Salem Housing for the Handicapped Salem, Massachusetts	Salem Housing Authority Salem, Massachusetts	50	1983
050	C	2 Father Mathew Condominiums Salem, Massachusetts	Richard Martin Corporation South Hamilton, Massachusetts	30	1983
050	C	3 Worcester Housing Worcester, Massachusetts	Worcester Housing Authority Worcester, Massachusetts	400	1983
050	C	4 Copley Place Housing Boston, Massachusetts	Urban Investment & Development Company Boston, Massachusetts	100	1983
088	C	5 Roosevelt Center Brockton, Massachusetts	Housing Authority Brockton, Massachusetts	250	1982
050	C	6 Carver Housing Carver, Massachusetts	South Shore Housing Council Carver, Massachusetts	160	1983
050	C	7 Teaticket Elderly Housing Falmouth, Massachusetts	Falmouth Housing Authority Falmouth, Massachusetts	650	1983

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050	C	9 Marlborough Home Marlborough, Massachusetts	Marlborough Home Association Marlborough, Massachusetts	50	1982
050	C	10 Ridge Road House Lincoln, Massachusetts	Endevor, Inc. Boston, Massachusetts	10	1981
050	C	11 Lechmere Canal Housing Cambridge, Massachusetts	Unihab, Inc. Cambridge, Massachusetts	510	1983
050	C	12 Saugus Housing Saugus, Massachusetts	Walnut Street Trust Saugus, Massachusetts	1,000	1983
050	C	13 Bedford PRD Bedford, Massachusetts	Unihab, Inc. Cambridge, Massachusetts	500	1983
050	C	14 Fitchburg Elderly Housing Fitchburg, Massachusetts	Housing Authority Fitchburg, Massachusetts	30	1982
050	C	15 East End House Cambridge, Massachusetts	Cambridge Redevelopment Authority Cambridge, Massachusetts	50	1981
050	C	16 Student Housing Medford, Massachusetts	Tufts University Medford, Massachusetts	350	1981
050	C	17 Wedgewood Place Winchester, Massachusetts	Endevor, Inc. Boston, Massachusetts	200	1982
050	C	18 Queen Anne Townhouses Norwell, Massachusetts	Richard Prouty Gloucester, Massachusetts	350	1983
050	C	19 Falmouth Elderly Housing Falmouth, Massachusetts	Falmouth Housing Authority Falmouth, Massachusetts	337	1982

050	C	20	Lincoln Subdivision Lincoln, Massachusetts	Endevor, Inc. Boston, Massachusetts	180	1982
050	C	21	Greenridge Housing Lincoln, Massachusetts	Endevor, Inc. Boston, Massachusetts	185	1981
050	C	22	South Portland Housing South Portland, Maine	Housing Authority South Portland, Maine	357	1981
050	C	23	Ellery Square Cambridge, Massachusetts	Unihab, Inc. Cambridge, Massachusetts	150	1980
050	C	24	Bennington Housing Bennington, Vermont	Housing Authority Bennington, Vermont	93	1980
050	C	25	Whitinsville Housing Whitinsville, Massachusetts	Housing Authority Whitinsville, Massachusetts	100	1981
050	C	26	Independence Manor II Braintree, Massachusetts	St. Francis of Assisi Residences Braintree, Massachusetts	200	1981
050	C	27	Pembroke Housing Pembroke, Massachusetts	Housing Authority Pembroke, Massachusetts	115	1981
050	C	28	Chelmsford Housing Chelmsford, Massachusetts	Housing Authority Chelmsford, Massachusetts	87	1981
050	C	29	Gardner/West Minister Housing Gardner, Massachusetts	Housing Authority Gardner, Massachusetts	235	1981
050	C	30	Newton South Housing Newton, Massachusetts	Housing Authority Newton, Massachusetts	65	1982
050	C	31	Beals Cove Apartments Hingham, Massachusetts	Spaulding & Slye Hingham, Massachusetts	150	1981

050	C	32	Pleasant Street Subdivision Brockton, Massachusetts	Wm. C. Bearce Associates Brockton, Massachusetts	250	1978
050	C	33	Canton Housing Canton, Massachusetts	Arnold Soloway Boston, Massachusetts	200	1978
050	C	34	Fitchburg Elderly Housing Fitchburg, Massachusetts	Housing Authority Fitchburgh, Massachusetts	380	1981
050	C	35	Trinity Housing Brockton, Massachusetts	Christian Community Trust Brockton, Massachusetts	450	1979
050	C	36	Housing for the Elderly Whitman, Massachusetts	Town of Whitman Whitman, Massachusetts	200	1978
		37				
		38				
		39				
		40				
		41				
		42				

12. The foregoing is a statement of facts

Signature: Gary W. Puryear Typed Name and Title: Gary W. Puryear, Vice President

Date: July 12, 1982

Standard Form 254 July 1975
Prescribed By GSA Fed Proc Reg (41 CFR) 1-16.903

STANDARD FORM (SF) 255
Architect-Engineer Related Services for Specific Project

1. Project Name / Location for which Firm is Filing:

Columbia Point Redevelopment
Boston, Massachusetts

2a. *Commerce Business Daily* Announcement Date, if any:

2b. Agency Identification Number, if any:

3. Firm (or Joint-Venture) Name & Address

Moriece & Gary, Inc.
25 Mount Auburn Street
Cambridge, Massachusetts 02138

3a. Name, Title & Telephone Number of Principal to Contact

Gary W. Puryear Principal, Vice President
(617) 868-2314

3b. Address of office to perform work, if different from Item 3

4. Personnel by Discipline:

1 Administrative	___ Electrical Engineers	___ Oceanographers	___
___ Architects	___ Estimators	___ Planners: Urban/Regional	___
___ Chemical Engineers	___ Geologists	___ Sanitary Engineers	___
___ Civil Engineers	___ Hydrologists	___ Soils Engineers	___
___ Construction Inspectors	___ Interior Designers	___ Specification Writers	___
___ Draftsmen	9 Landscape Architects	___ Structural Engineers	___
___ Ecologists	___ Mechanical Engineers	___ Surveyors	___
___ Economists	___ Mining Engineers	___ Transportation Engineers	10 Total Personnel

5. If submittal is by Joint-Venture list participating firms and outline specific areas of responsibility (including administrative, technical and financial) for each firm: (Attach SF 254 for each if not on file with Procuring Office.)

5a. Has this Joint-Venture previously worked together? ☐ yes ☐ no

7. Brief Resume of Key Persons, Specialists, and Individual Consultants Anticipated for this Project

a. Name & Title:
Benjamin W. Gary, Jr.
Principal and President

b. Project Assignment:
Supervision of staff and liaison with client

c. Name of Firm with which associated:
Moriece & Gary, Inc.

d. Years experience: With This Firm 25 With Other Firms 0

e. Education: Degree(s) / Year / Specialization
Masters/1957/Landscape Architecture

f. Active Registration: Year First Registered/Discipline
1964/Landscape Architecture

g. Other Experience and Qualifications relevant to the proposed project:
Lynn Heritage State Park, Lynn, Ma. - Master Planning and design for an oceanfront park including 2 marinas, parking and other recreational facilities.
Hull Urban Renewal Project, Hull, Ma. - Reviewing consultants for landscape development and site engineering for 35 acre residential, commercial and recreation project.
Thomas Graves Landing, Cambridge, Ma. - Site development and landscape for 175 units of housing along the Lechmere Canal.
Great Brook Valley Housing, Worcester, Ma. - Site development and landscape improvements for a large multi-family housing development.
Clark House/Boltwood Walk Elderly Housing, Amherst, Ma. - Landscape development, streetscape improvements and pedestrian linkage system for commercial, municipal and housing complex.
Burlington Waterfront, Burlington, Vt. - Master plan for historical district and overall waterfront development.

a. Name & Title:
Gary W. Puryear
Principal and Vice President

b. Project Assignment:
Project management, supervision of staff, client and consultant coordination, construction inspection

c. Name of Firm with which associated:
Moriece & Gary, Inc.

d. Years experience: With This Firm 11 With Other Firms 2

e. Education: Degree(s) / Years / Specialization
B.S.L.A./1967/Landscape Architecture
M.L.A./1971/Landscape Architecture

f. Active Registration: Year First Registered/Discipline
1973/Landscape Architecture

g. Other Experience and Qualifications relevant to the proposed project:
Ocean Village on the Shore, Long Island, N.Y. - Design, preparation of contract documents and construction inspection of 1,053 units of mixed housing, recreational and play areas and commercial facilities in an oceanfront urban renewal district.
Belle Isle Marsh Reservation, East Boston, Ma. - Design, preparation of contract documents and construction inspection of marsh land restoration, canal work and other site improvements.
Copley Place Corridor Park - Site improvements for housing, community retail and a shopping mall complex including streetscape improvements.
Southwest Corridor Project, Boston, Ma. - Development of a 3/4 mile long urban parkway system within the southend/St. Botolph/Back Bay neighborhoods including recreation facilities, open space, urban plazas, streetscape and other associated improvements.

7. Brief Resume of Key Persons, Specialists, and Individual Consultants Anticipated for this Project

a. Name & Title:

Joseph A. Marshall, III
Associate and Landscape Architect

b. Project Assignment:

Landscape Design and Document Production

c. Name of Firm with which associated:

Moriece & Gary, Inc.

d. Years experience: With This Firm 3 With Other Firms 3

e. Education: Degree(s) / Year / Specialization

B.S./1974/Landscape Architecture
M.L.A./1976/Landscape Architecture

f. Active Registration: Year First Registered/Discipline

1982/Landscape Architecture

g. Other Experience and Qualifications relevant to the proposed project:

Professional experience has included planning, design and construction supervision of municipal grants. Mr. Marshall has extensive experience on a wide variety of urban parks, housing and commercial projects.

a. Name & Title:

Thomas V. Ursch
Associate and Landscape Architect

b. Project Assignment:

Landscape Design and Document Production

c. Name of Firm with which associated:

Moriece & Gary, Inc.

d. Years experience: With This Firm 3 With Other Firms 3

e. Education: Degree(s) / Years / Specialization

B.S./1974/Landscape Architecture
M.L.A./1976/Landscape Architecture

f. Active Registration: Year First Registered/Discipline

g. Other Experience and Qualifications relevant to the proposed project:

Experienced in urban park design, Mr. Ursch's current emphasis is on urban housing and strectscape improvements for Boston, Cambridge and various other towns in the Commonwealth of Massachusetts.

Standard Form 255 July 1975
Prescribed By GSA Fed Proc Reg (41 CFR) 1-16 803

6. Work by Firm or Joint Venture Members which Best Illustrates Current Qualifications Relevant to this Project (List not more than 10 Projects)

a. Project Name & Location	b. Nature of Firm's Responsibility	c. Owner's Name & Address	d. Completion Date (actual or estimated)	e. Estimated Cost (in thousands)	
				Entire Project	Work for which Firm was/is responsible
(1) Copley Place Corridor Park Boston, Ma.	Design, Working Drawings & Construction Inspection	Urban Investment & Development 200 Clarendon Street Boston, Ma.	1983	$1,900	$1,900
(2) Lynn Heritage State Park Lynn, Ma.	Master Planning & Design	City of Lynn, Lynn, Ma. and Department of Environmental Management, Boston, Ma.	1982	$ 63	$ 63
(3) Ocean Village on the Shore Long Island, New York	Design, Working Drawings & Construction Inspection	Arverne Associates 1921A Mott Avenue Far Rockaway, New York	1978	$1,200	$1,200
(4) Thomas Graves Landing Cambridge, Ma.	Design, Working Drawings & Construction Inspection	Unihab, Inc. 14 Arrow Street Cambridge, Ma.	1983	$ 510	$ 510
Fort Point Channel Boston, Ma.	Master Planning and Design	Richard Salemi Associates Broadway Everett, Ma.	1983	$1,000	$1,000
Belle Isle Marsh Reservation East Boston, Ma.	Master Planning, Design, Working Drawings & Construction Inspection	Metropolitan District Commission Boston, Ma.	1983	$1,250.	$1,250.
Franklin Park Zoo Boston, Ma.	Master Planning, Design, Working Drawings & Construction Inspection	Metropolitan District Commission Boston, Ma.	1983	$3,300	$2,200
Hull Urban Renewal Hull, Ma.	Master Planning and Design	Hull Redevelopment Authority Hull, Ma.	1982	$ 750	$ 750
Riverside Press Park Cambridge, Ma.	Design, Working Drawings and Construction Inspection	City of Cambridge Cambridge, Ma.	1981	$1,000	$1,000
Southwest Corridor Project Boston, Ma.	Master Planning, Design, Working Drawings & Construction Inspection	Massachusetts Bay Transit Authority Boston, Ma.	1984	$4,250	$2,200

Standard Form 255 July 1975
Prescribed By GSA Fed. Proc. Reg (41 CFR) 1-16.803

As landscape architects, Moriece and Gary, Inc., from 1948 on have planned and designed the development of recreation and open space for over fifty (50) communities in New England alone. Although certain commissions consisted primarily of Master Planning, most of the projects were constructed under the inspection of this company.

In addition, over 250 school sites have been designed and constructed containing playfields, play equipment, tennis courts, running tracks and other recreation facilities.

In collaboration with architects and engineers, Moriece and Gary, Inc. have planned, designed and supervised the construction of sites for thousands of housing units. The scope of services includes:

- Site Analysis
- Master Planning
- Cost Estimating and Scheduling
- Contract Documents
- Construction Supervision

The majority of housing has been constructed in New England and Mid-Atlantic States with a few developments along the eastern seaboard and Virgin Islands. In addition to housing the firm's work has included a complete range of community, commercial and recreation related facilities including colleges, parks and shopping centers.

Housing Classifications, Types and Clients

The firm's experience has included the following classifications of housing developments:

- Resort
- Elderly
- Low-Income
- Veterans
- Military
- Luxury
- College

With a wide range of building types:

- Patio Houses
- Single Family Detached
- High and Mid-rise
- Garden Apartments
- Town Houses

arranged on sites containing from fifty to over one thousand units. Clients have been a balance from the public and private sector. The firm also has extensive experience in dealing with the special redevelopment problems associated with renovations and restorations.

11. The foregoing is a statement of facts.

Signature: Gary W. Puryear **Typed Name and Title:** Gary W. Puryear, Vice President

Date: November 1, 1982

Standard Form 256 July 1975
Prescribed By GSA Fed. Proc. Reg. (41 CFR) 1-16.505

SIPPICAN CONSULTANTS INTERNATIONAL, INC.

Representative Experience with Projects of Similar Magnitude

King Khalid Military City
Al Batin, Saudi Arabia
Construction Cost: $ 7,600,000,000
Completion: 1985

Wentworth-by-the-Sea Renovation
Newcastle, New Hampshire
Construction Cost: $ 30,000,000
Completion: 1984

Lafayette Place
Boston, Massachusetts
Construction Cost: $ 45,000,000
Completion: 1983

Hilton Hotel and Garage
Boston, Massachusetts
Construction Cost: $ 20,000,000
Completion: 1982

Intercontinental Hotel
Abu Dhabi, United Arab Emirates
Construction Cost: $ 125,000,000
Completion: 1980

Intercontinental Oasis Hotel
Al Ain, United Arab Emirates
Construction Cost: $ 95,000,000
Completion: 1980

Hyatt Regency Hotel
Boston, Massachusetts
Construction Cost: $ 17,500,000
Completion: 1976

Audubon Village Housing
Amherst, New York
Construction Cost: $ 14,000,000
Completion: 1975

SIPPICAN CONSULTANTS INTERNATIONAL, INC.

Representative Experience with Projects of Similar Magnitude

Wellesley Green Condominiums
Wellesley, Massachusetts
Construction Cost: $ 8,300,000
Completion: 1974

Baystate West Hotel and Commercial Complex
Springfield, Massachusetts
Construction Cost: $ 95,000,000
Completion: 1973

Berkshire Common Hotel and Commercial Center
Pittsfield, Massachusetts
Construction Cost: $ 11,000,000
Completion: 1972

Luther Towers Housing Development
Memphis, Tennessee
Construction Cost: $ 7,000,000
Completion: 1971

SIPPICAN CONSULTANTS INTERNATIONAL, INC.

Representative Experience on Soil Conditions Similar to this Project

UMASS Columbia Point Administration Building
Boston, MA
Construction Cost: $ 4,900,000
Completion: 1974

UMASS Columbia Point Academic Building
Boston, MA
Construction Cost: $ 18,890,000
Completion: 1974

UMASS Columbia Point Library and Plaza
Boston, MA
Construction Cost: $ 20,000,000
Completion: 1974

UMASS Columbia Point Science Building
Boston, MA
Construction Cost: $ 20,000,000
Completion: 1974

GSA Federal Office Building
Boston, MA
Construction Cost: 67,500,000
Completion: 1985

Harbor Square Condominiums
Camden, ME
Construction Cost: $ 1,500,000
Completion: 1982

National Aquarium
Baltimore, Maryland
Construction Cost: $ 16,000,000
Completion: 1980

Museum of Transportation Study
Boston, MA
Construction Cost: N/A
Completion: 1975

New England Aquarium
Boston, MA
Construction Cost: $ 4,000,000
Completion: 1974

SIPPICAN CONSULTANTS INTERNATIONAL, INC.

Representative Housing Experience

King Khalid Military City
Wadi Al Batin, Saudi Arabia
Construction Cost: $7,600,000,000
Completion: 1985

Harbor Square Condominiums
Camden, Maine
Construction Cost: $1,500,000
Completion: 1982

Mount Vernon Church Condominiums
Boston, Massachusetts
Construction Cost: N/A
Completion: 1982

New York University Residence Hall
New York, New York
Construction Cost: $15,000,000
Completion: 1981

Pittsfield Housing
Pittsfield, Massachusetts
Construction Cost: $8,000,000
Completion: 1978

Prospect Heights Apartments
Holyoke, Massachusetts
Construction Cost: $1,500,000
Completion: 1978

Hanson Housing
Hanson, Massachusetts
Construction Cost: $1,500,000
Completion: 1978

McPherson Apartments Solar Projects
Gloucester, Massachusetts
Construction Cost: $150,000
Completion: 1978

SIPPICAN CONSULTANTS INTERNATIONAL, INC.

Representative Housing Experience

Sudbury Housing for the Elderly
Sudbury, Massachusetts
Construction Cost: $1,500,000
Completion: 1977

Schermerhorn Towers Housing
Brooklyn, New York
Construction Cost: N/A
Design Complete: 1977

Audubon Village
Amherst, New York
Construction Cost: $14,000,000
Completion: 1975

Acorn Solar Housing
Concord, Massachusetts
Construction Cost: $50,000
Completion: 1975

Stone Tower Condominiums - Wall Investigations
Cambridge, Massachusetts
Construction Cost: N/A
Completion: 1975

Presidential Heights and Bay Village
New Bedford, Massachusetts
Construction Cost: $400,000
Completion: 1974

Wellesley Green Condominiums
Wellesley, Massachusetts
Construction Cost: $8,300,000
Completion: 1974

1105 Massachusetts Avenue
Cambridge, Massachusetts
Construction Cost: $3,000,000
Completion: 1974

SIPPICAN CONSULTANTS INTERNATIONAL, INC.

Representative Housing Experience

Cambridge Housing for the Elderly
Cambridge, Massachusetts
Construction Cost: $11,200,000
Completion: 1974

Huntington Avenue Apartments
Boston, Massachusetts
Construction Cost: $8,000,000
Completion: 1974

Detroit Shore Club Housing
Detroit, Michigan
Construction Cost: $6,200,000
Completion: 1974

The Piano Factory - Renovation into 250 Apartments
Boston, Massachusetts
Construction Cost: $1,800,000
Completion: 1974

Commercial Wharf West Renovation
Boston, Massachusetts
Construction Cost: $1,000,000
Completion: 1974

Marine Barracks
Washington, D.C.
Construction Cost: $8,100,000
Completion: 1972

Amelia Island Condominiums
Jacksonville, Florida
Construction Cost: $4,600,000
Completion: 1972

Memphis Elderly Housing - Luther Towers
Memphis, Tennessee
Construction Cost: $2,600,000
Completion: 1971

SIPPICAN CONSULTANTS INTERNATIONAL, INC.

Representative Housing Experience

63 Atlantic Avenue - Factory Renovation into 40 Apartments
Boston, Massachusetts
Construction Cost: $1,200,000
Completion: 1971

Washington Park Housing for the Elderly
Roxbury, Massachusetts
Project Cost: $33,800,000
Completion: 1971

Brunswick Elderly Housing
Brunswick, Maine
Construction Cost: $1,400,000
Completion: 1970

Representative Housing Renovation Experience

Mount Vernon Church Condominiums
Boston, Massachusetts

Structural renovations to transform burned-out church into condominiums

Estimated Construction Cost: N/A
Estimated Completion: 1982

Meridien Hotel
Boston, Massachusetts

Structural renovations for complete rehabilitation of 328 room hotel

Construction Cost: $ 13,000,000
Completion: 1981

Presidential Heights / Bay Village
Bedford, Massachusetts

Mechanical and electrical renovations

Construction Cost: $ 1,500,000
Completion: 1975

The Piano Factory
Boston, Massachusetts

Total engineering services to transform factory into 250 apartments

Construction Cost: $ 1,800,000
Completion: 1974

Commercial Wharf
Boston, Massachusetts

Structural renovations to warehouses for conversion to apartments and retail stores

Construction Cost: $ 1,000,000
Completion: 1974

Representative Housing Renovation Experience

63 Atlantic Avenue
Boston, Massachusetts

Total engineering services for renovation of 40 units

Construction Cost: $ 1,200,000
Completion: 1971

Phillips/Exeter Academy
Exeter, New Hampshire

Mechanical and electrical renovations to two dormitories

Construction Cost: $ 1,000,000
Completion: 1968

SIPPICAN CONSULTANTS INTERNATIONAL, INC.

Representative Urban Renewal/Community Development Projects

Citicorp Center
New York, New York
Structural engineering for 59-story office building with two-level retail shopping plaza as part of NYC's urban renewal plan
Construction Cost: $ 150,000,000
Completion: 1977

Revitalization of Chelsea City Center
Chelsea, Massachusetts
Electrical and utility engineering for revitalization of downtown area, including parks
Construction Cost: $ 1,500,000
Completion: 1977

Faneuil Hall Marketplace
Boston, Massachusetts
Structural engineering for transformation of three 1850 historical landmark buildings into retail and office space
Construction Cost: $ 25,000,000
Completion: 1976

Downtown Washington Streets for People
Washington, D.C.
Structural and civil engineering for revitalization of downtown area
Construction Cost: $ 10,000,000
Completion: 1976

Commercial Wharf
Boston, Massachusetts
Structural, mechanical/electrical and civil engineering for retoration and conversion of warehouse into retail and residential space
Construction Cost: $ 1,000,000
Completion: 1974

Lewis Wharf
Boston, Massachusetts
Structural and civil engineering for restoration and conversion of warehouse into residential space
Construction Cost: $ 2,400,000
Completion: 1971

Representative Waterfront Experience

Harbor Square Condominiums
Camden, Maine
Construction Cost: $ 1,500,000
Completion: 1982

Structural, Mechanical and Electrical Engineering Design Services

Museum of Transportation Study
Boston, Massachusetts
Construction Cost: N/A
Completion: 1975

Structural Investigation of Waterfront Museum

New England Aquarium
Boston, Massachusetts
Construction Cost: $ 4,000,000
Completion: 1974

Structural, Civil-Site, Mechanical and Electrical Engineering Design Services

Commercial Wharf
Boston, Massachusetts
Construction Cost: $ 1,000,000
Completion: 1974

Structural Conversion of Warehouses into Condominiums and Retail Facilities

Rusty Scupper Restaurant
Boston, Massachusetts
Construction Cost: $ 50,000
Completion: 1972

Structural Analysis for Conversion of Warehouse into Restaurant

Lewis Wharf
Boston, Massachusetts
Construction Cost: $ 2,400,000
Completion: 1971

Structural and Civil-Site Studies and Renovations

SIPPICAN CONSULTANTS INTERNATIONAL, INC.

Representative Site and Utilities Experience

King Khalid Military City
Al Batin, Saudi Arabia

Total engineering services for a city of 70,000 persons, including 35 km of paved bituminous concrete vehicular roads and highways, 50 km of aggregate surfaced service roads, bridges, utility tunnels, finished parking, pedestrian surfaces, 2,300,000 m^2 of building area, electrical distribution systems, underground distribution cabling, storm water drainage and irrigation, and landscape underdrainage.

Estimated Project Cost: $7,600,000,000
Estimated Completion: 1985

Mitre Corporation
Bedford, Massachusetts

Site work, parking, lighting, piping and water resource development for an industrial park with three office buildings and a boiler plant.

Estimated Project Cost: $12,000,000
Estimated Completion: 1982

Al Azizia Shopping Center
Riyadh, Saudi Arabia

Civil/site engineering including all site grading and utilities.

Estimated Project Cost: $3,800,000
Estimated Completion: 1982

Larkin Williams Road and Rudder Road
Fenton, Missouri

Roadway improvements including grading, paving, ramp structures and drainage.

Estimated Project Cost: $1,500,000
Estimated Completion: 1982

SIPPICAN CONSULTANTS INTERNATIONAL, INC.

Representative Site and Utilities Experience

Colonial Williamsburg Visitor Center
Williamsburg, Virginia

A 6000 m^2 addition to the main visitor center and extensive renovations to an existing 700 car parking area, including development of new circulation patterns.

Estimated Project Cost: $5,200,000
Estimated Completion: 1981

Museum of Fine Arts
Fort Lauderdale, Florida

Access roads, service road and parking for one hundred cars. The selected pavement design supplied a cost effective solution for the anticipated traffic as well as a flexible, free draining surface that complied with the local requirements.

Estimated Project Cost: N/A
Estimated Completion: 1981

Systems Management Engineering Facility
Hanscom Air Force Base, Bedford, Massachusetts

Site work, utilities, and parking surfaces for a 133,622 square foot office building, including grading, drainage and off-site drainage.

Estimated Project Cost: $9,300,000
Estimated Completion: 1981

Best Products Corporation Headquarters
Richmond, Virginia

Civil/site engineering including layout, grading, drainage and paving of a 35-acre site.

Project Cost: $5,000,000
Completion: 1980

SIPPICAN CONSULTANTS INTERNATIONAL, INC.

Representative Site and Utilities Experience

Digital Equipment Corporation
Maynard, Massachusetts

Civil/site engineering including site development, roads and parking facilities.

Project Cost: $7,200,000
Completion: 1980

Dallas/Fort Worth Regional Airport
Dallas, Texas

Structural and civil/site engineering including ramp structures and elevated roads.

Project Cost: $100,000,000
Completion: 1973

PEABODY & BROWN
One Boston Place
Boston, Massachusetts 02108

Peabody and Brown and its predecessors have been engaged in the practice of law in Boston for more than 100 years. The firm currently has 65 lawyers and engages in a broad-based practice which includes all aspects of the development and financing of real estate. Peabody & Brown's real estate expertise covers the full range development process from zoning and land use permitting, title work, architectural and construction contracts, performance and payment bonds, construction and permanent financing, the organization of the ownership entity (including limited partnerships), both mortgage and equity financing, (including syndication) the structuring and preparation of both condominium and cooperative associations, and conventional and governmentally-assisted financing programs, including urban development action grants.

Peabody & Brown's involvements in recent years include the following:

1. Peabody and Brown has been the general counsel to the developer of the Chelsea Naval Hospital Site. This assignment has included assistance in the preparation in the development plan, assistance to the City of Chelsea in the preparation of the UDAG applications and necessary authorizing votes, the drafting of special legislation enacted by the General Court, the closing of construction and permanent financing with the Department of Housing and Urban Development, and the negotiation and preparation

of various other construction, financing and development agreements.

2. Peabody & Brown represented the tenants in connection with the conversion of Jamaicaway Towers from rental apartments to cooperative corporation ownership. This was the most notable conversion from apartment to cooperative ownership to occur in Boston during the 1970's. The Firm prepared the cooperative corporate and residential tenancy documents and represented the tenants in negotiating the terms of financing with the owner and the major institutional lenders. The Jamaicaway conversion and its legal package are now viewed as the model for housing cooperatives in Massachusetts.

3. Peabody & Brown was counsel for the owner of the Merchantile Wharf building and counsel for the lender on the Lewis Wharf Project, both of which are mixed commercial/housing developments involving the renovation and rehabilitation of 19th century commercial buildings located on Boston's waterfront.

4. Peabody & Brown has had extensive dealings with the Department of Housing and Urban Development and the Massachusetts Housing Finance Agency. The Firm has acted as counsel for the mortgagor in closings for substantially all of the various multi-family housing programs provided or assisted by both agencies. During the past 10 years, the firm's mortgage closings with these agencies have averaged in excess of a dozen annually.

5. Peabody & Brown closed the first Section 11(b) tax exempt mortgage financing in Massachusetts for School House 77 Project. Housing Innovations was the developer of this project in

Boston. This creative financing permitted lower cost financing for the project by funding the mortgage with tax exempt housing revenue bonds underwritten by an affiliate of Merril/Lynch. Peabody & Brown has represented the developer in several other Section 11(b) financings since School House 77.

6. Peabody & Brown has had extensive contacts with the Massachusetts Industrial Finance Agency, acting as bond counsel for the financing of numerous projects through the sale of revenue bonds. Such projects include mixed use housing in commercial area revitalization districts (CARD).

7. Peabody & Brown has been the leading law firm in Boston in the development and refinement of the syndication technique for the raising of equity financing for real estate. The firm represents both developers and underwriters in syndication work and is regularly involved in private placements, public offerings registered with the securities and exchange commission, pooled funds structured to invest in numerous projects, and the registration of all of such offerings with the "blue sky" securities offices of the various states. Last Winter, Peabody & Brown was counsel to the owner for the syndication of the Long Wharf Marriott Hotel and presently represents the owner for the syndication of the Meridien Hotel in Post Office Square. The Firm regularly syndicates subsidized housing, including the rehabilitation and historic restoration properties, and also commercial and other properties. In recent years, the firm has been involved in the syndication in approximately 100 properties annually.

8. Peabody & Brown has been in the forefront of condominium work, having been involved in dozens of condominiums in Boston and eastern Massachusetts since the late 60's.

9. Peabody & Brown is an approved attorney for the issuance of title insurance policies for several of the major title companies having offices in Boston. The firms attorneys include an approved Land Court Examiner and the firm is experienced in all facets of the land registration process and related procedures for the clearing up of title defects.

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